Total Shop Management
User Manual

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eDirectGlass Total Shop Management

by AMJ Logistics, Inc.

eDirectGlass Total Shop Management User Manual

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Special thanks to:

All the people who contributed to the development of this great system. In addition, to all of those who put up with revision after revision of this manual.

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Many Claims - One Solution

It's Everything You Need!

The Freedom to...

* Manage your operations; anytime-anywhere!
* Eliminate EDI confusion and transaction payments.
* Direct Bill with confidence.
* Take Back Control!

More than a POS system, eDirectGlass is a Total Shop Management system that allows you to get more from your business. eDirectGlass reduces double-entry, automates cost authorization, and streamlines work production.

With eDirectGlass, you can focus on the things that matter the most to your business; like reducing day-to-day business costs, increasing productivity and greater billing flexibility, just to name a few.

Because the Right Tools Make All the Difference.

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Part

1 Getting Started

1.1 Introduction

eDirectGlass™ Vanshop TSM is an evolutionary way of doing business for automotive glass retailers in Canada. eDirectGlass Vanshop TSM was designed to give the industry fair access to billing and claims data using proven patented Internet technology. eDirectGlass Vanshop TSM is a cost effective, efficient system that unites the industry without the unnecessary high costs associated with the current data networks and proprietary POS systems offered by legacy vendors.

eDirectGlass™ Benefits

- eDirectGlass™ eliminates the costs and hassle of working through multiple vendors such as POS and Claims networks. With eDirectGlass there is now a direct route between shops, vendors and insurance companies. You no longer have to pay for or share your information with multiple parties. You are in control of your own network!
- Integrated POS, Management and Purchasing. Stop paying for and using multiple services. With eDirectGlass™ Vanshop TSM, you have all of the tools to manage your business in one place.
- Through the use of MultiLogic technology, eDirectGlass™ can automatically analyze all claims and invoices to ensure they are formatted correctly. This process allows the work and payment process to be greatly accelerated.
- eDirectGlass™ can work with non-electronic vendors! When you submit invoices to eDirectGlass™, you can mark non-electronic vendors and we'll make sure it gets to the right place. You will receive electronic notification that the vendor has received the invoice from eDirectGlass™.
- **AND MORE!** eDirectGlass™ is built on proven technology and is easy to use.

Everything you will need to know about configuring and using eDirectGlass is in this guide. This manual will help you better understand the features and benefits of eDirectGlass. It will explain how to correctly setup eDirectGlass, create and work with jobs and assignments and communicate with your business partners.

This manual should answer any questions you may have and explain, in detail, all of the capabilities, features and benefits of the software.

1.2 System Requirements

This section discusses the hardware and software components your computer needs in order to run eDirectGlass. The components described are the minimum items necessary. eDirectGlass may run more efficiently with a faster processor, more memory and a broadband Internet connection.

Hardware Requirements

- Pentium 3 or equivalent Processor.
- 256MB of RAM or greater.
- Free Disk Space - You should always have 200MB of Free Disk Space for your computer to run smoothly. eDirectGlass does not require any disk space other than the space required by Internet Explorer to run.
- Color Monitor (800 x 600 resolution and high-color 16 bit minimum).

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- Inkjet or Laser Printer with minimum 600dpi output quality.

Operating System Requirements

- Microsoft Windows 2000, Windows XP or Windows Vista.
- Microsoft Internet Explorer 6.x or greater. **(Netscape, Mozilla/Firefox and Beta Versions of IE Are Not Supported). eDirectGlass only supports Internet Explorer.**

Communication Connectivity Requirements

- Internet connection: 56k is the minimum required speed, but a DSL or other high-speed connection is strongly recommended for better performance of eDirectGlass.
- Standard Internet Service Provider (ISP): Some ISP's limit function such as email size and connectivity timeout. Check with your ISP to see what limitations apply. We do not recommend AOL, Juno, NetZero or WebTV dial-up accounts.
- Valid e-mail address for order inquiry and confirmation.

1.3 Screen Settings

To ensure the best possible screen display of eDirectGlass© Vanshop TSM edition you will need to check and adjust your computer screen settings.

Screen Resolution: From your Desktop, right mouse click on any blank area of the screen, and select **Properties** from the menu. Go to the **Settings** tab, and change or adjust the screen resolution. Increasing the resolution will improve the screen view. Each system is different; your system's maximum resolution may differ from the example shown below. **The minimum resolution setting is 800 by 600.**

Display Properties Screen

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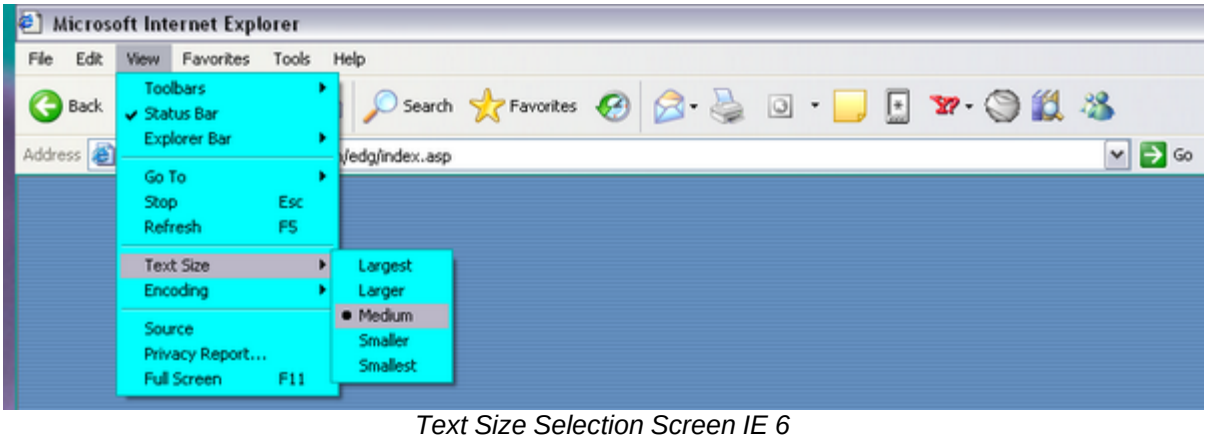
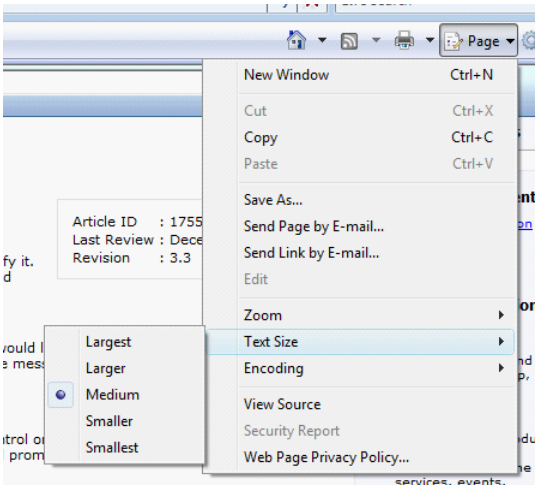
1.4 Text Size

You should also double check the viewing text size for your Internet browser. With Internet Explorer opened, go to the menu bar at the top of the screen. Select **View**. From the View sub menu, select **Text Size**, and then select **Medium**.

***NOTE - THIS MAY DIFFER IN INTERNET EXPLORER 7 AND ABOVE.**



Text Size Selection Screen IE 6



Text Size Selection Screen IE 7

1.5 Security Settings

NOTE: These instructions only apply to Internet Explorer 7.x. We recommend that you upgrade to this new version if you are using Internet Explorer 5.x or 6.x.

1) **Run the following links to automatically install the necessary settings for your 'Trusted Sites' security level settings:**

   http://www.edirectglass.com/downloads/edgtrustedsite.reg
   http://www.edirectglass.com/downloads/edgscripttimeout.reg

   NOTE: If your machine has multiple user login accounts, you must run this file under each user login.

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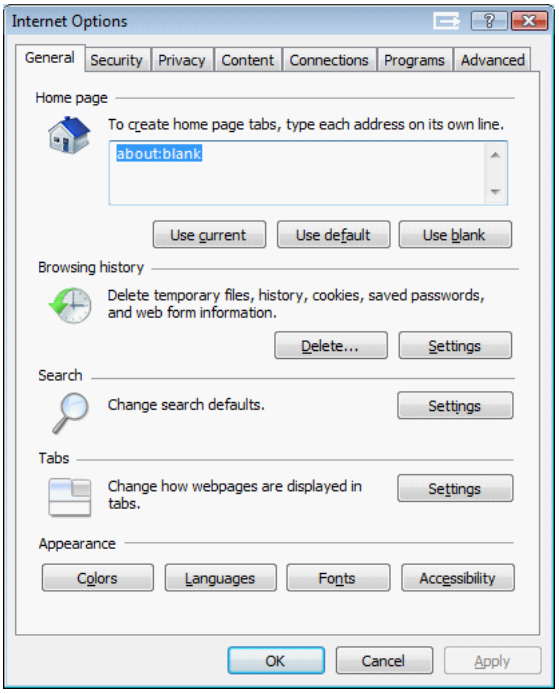
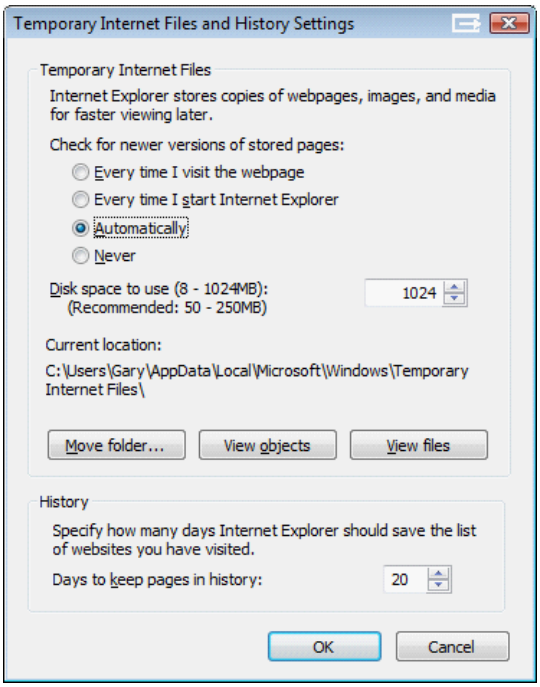
2) In Internet Explorer, click on the Tools button and then select 'Internet Options'.

3) In the 'General Tab', click on the 'Settings' button under the 'Browsing history' section.

4) In the 'Temporary Internet Files and History Settings' window, make sure that 'Automatically' is selected and click on the OK button.




Temporary Internet Files and History Settings
Temporary Internet Files
Internet Explorer stores copies of webpages, images, and media for faster viewing later.
Check for newer versions of stored pages:
Every time I visit the webpage
Every time I start Internet Explorer
Automatically
Never
Disk space to use (8 - 1024MB):
(Recommended: 50 - 250MB)
1024
Current location:
C:\Users\Gary\AppData\Local\Microsoft\Windows\Temporary Internet Files\
Move folder...
View objects
View files
History
Specify how many days Internet Explorer should save the list of websites you have visited.
Days to keep pages in history:
20
OK
Cancel

5) In the Internet Options Panel, Select the 'Security' tab.

6) In the 'Security' window, select the 'Sites' button.

7) Add *.edirectglass.ca, *.vanfax.com and *.belroncanada.com in the Trusted Site list as shown in the picture below and then click on the 'Close' button:

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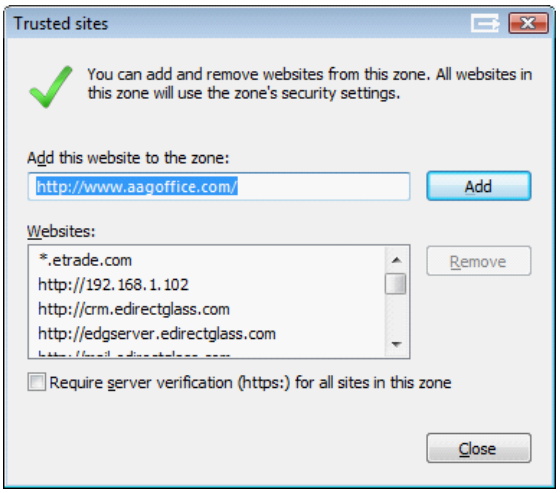
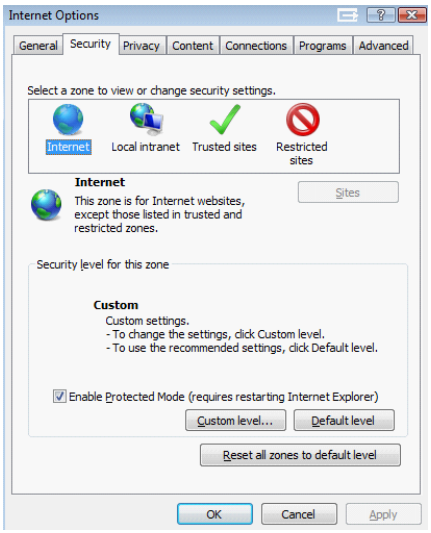
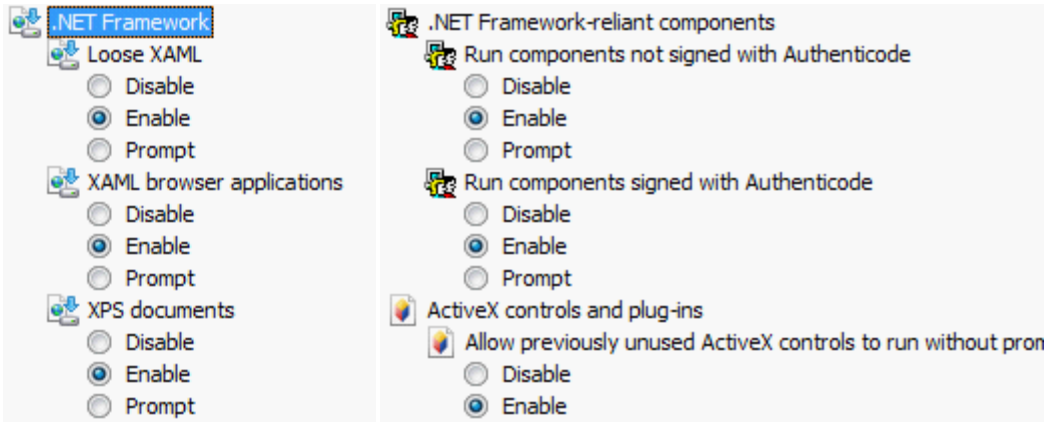


8) In the 'Security' window, select the 'Trusted Sites' icon and then click on the Custom level... button.



9) In the 'Settings' menu, verify the following items are set as displayed:



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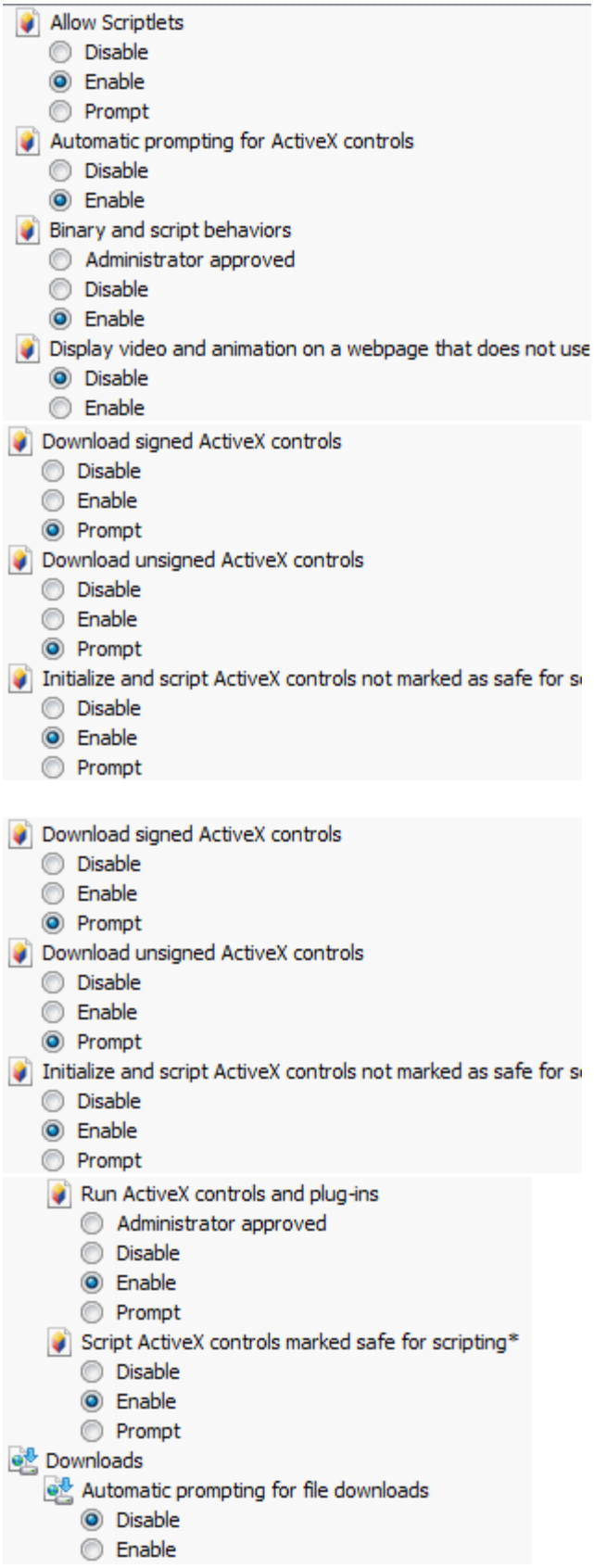

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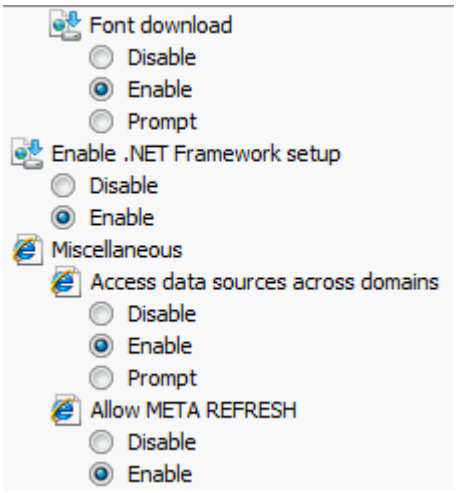

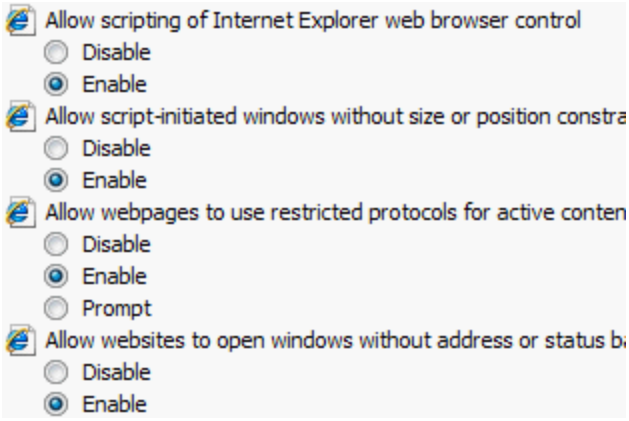

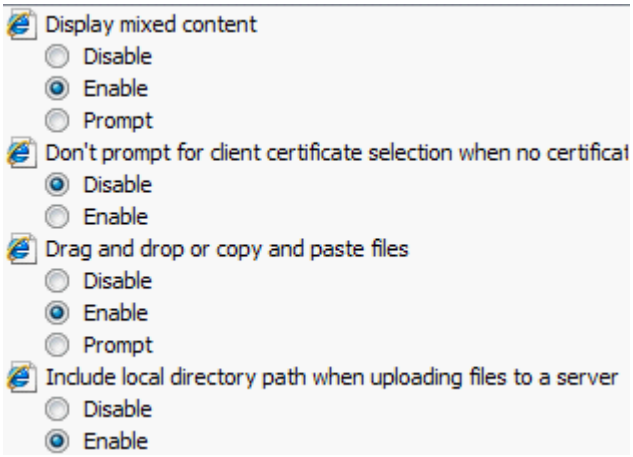

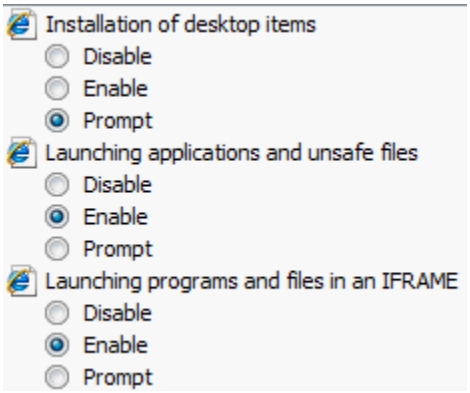

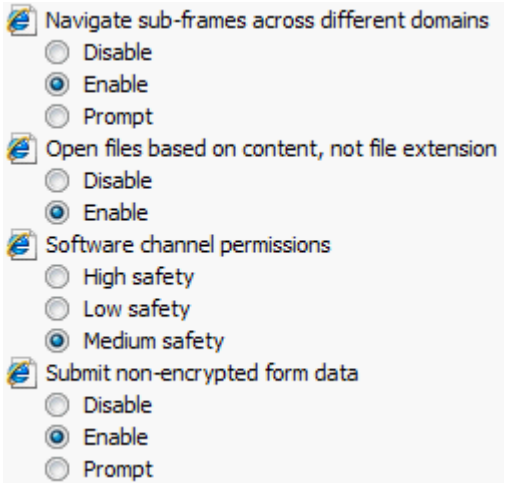

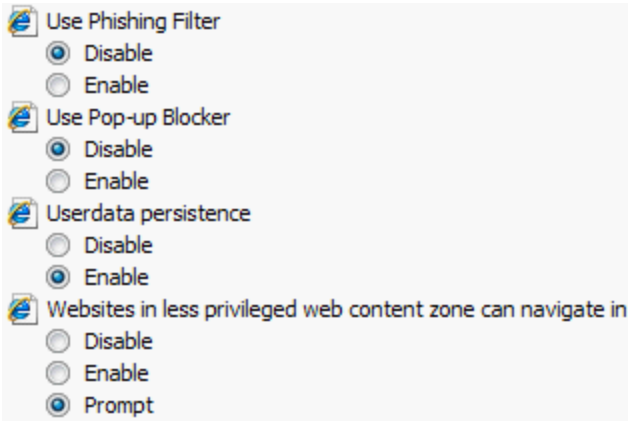

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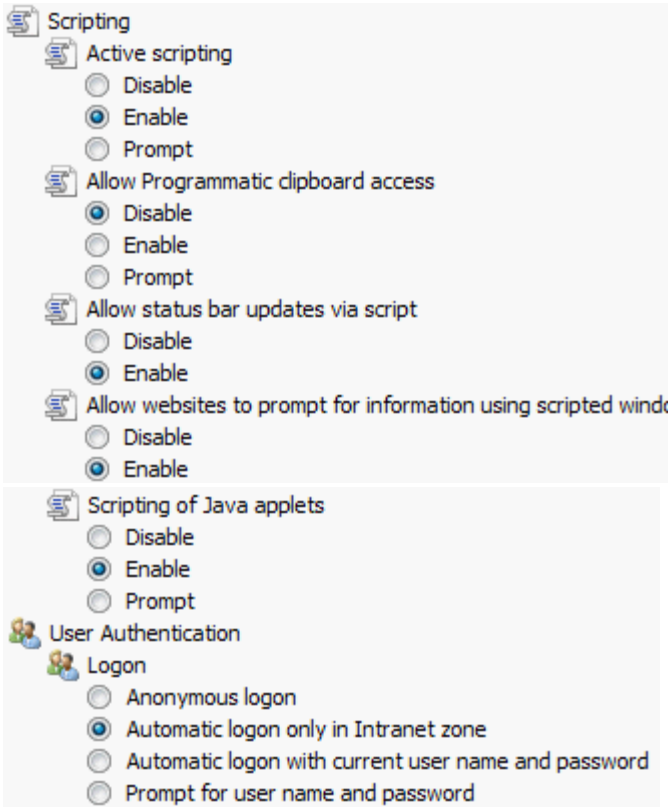
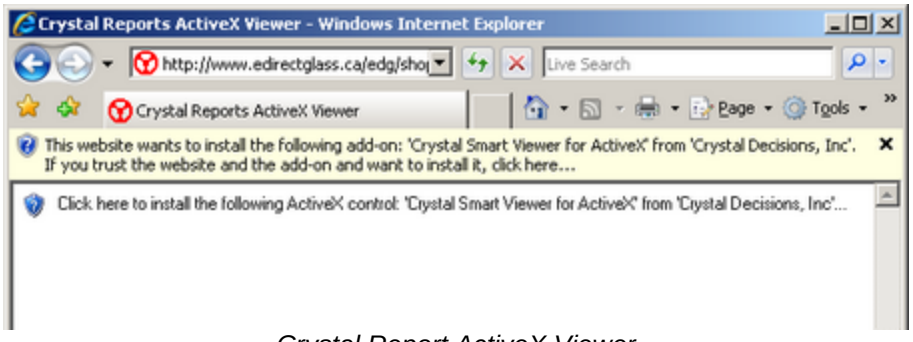


10) When you have verified these settings, click on OK to return to the 'Security' window.

11) At the 'Security' menu, click the 'OK' button and then **close all instances of Internet Explorer before performing the last step.**

1.6 Installing Crystal Report Viewer

When you first click on any of the Print (Quote, Work Order, Invoice) buttons in eDirectGlass, it will prompt you to install the 'Crystal Smart Viewer for ActiveX'.


Crystal Reports ActiveX Viewer - Windows Internet Explorer
http://www.edirectglass.ca/edg/sho
Live Search
Crystal Reports ActiveX Viewer
Page
Tools
This website wants to install the following add-on: 'Crystal Smart Viewer for ActiveX' from 'Crystal Decisions, Inc'.
If you trust the website and the add-on and want to install it, click here...
Click here to install the following ActiveX control: 'Crystal Smart Viewer for ActiveX' from 'Crystal Decisions, Inc'...

Crystal Report ActiveX Viewer

1. Click on the yellow highlighted area and a drop-down menu will appear.
2. Click on the "Install ActiveX Control" in the drop-down.

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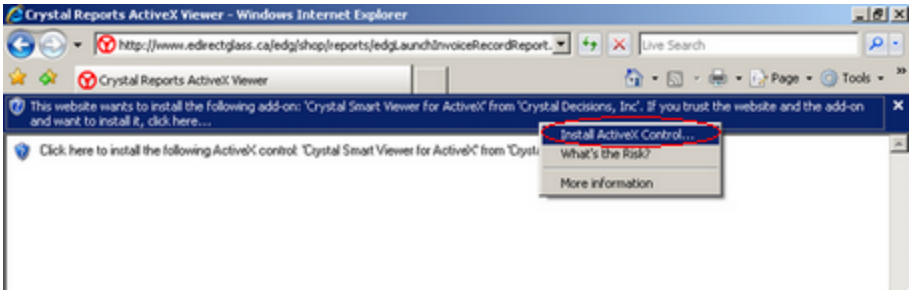
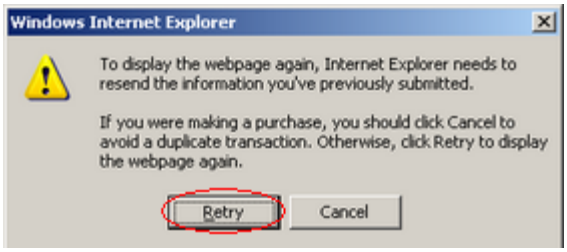

Crystal Reports ActiveX Viewer - Windows Internet Explorer
Crystal Reports ActiveX Viewer
This website wants to install the following add-on: 'Crystal Smart Viewer for ActiveX' from 'Crystal Decisions, Inc'. If you trust the website and the add-on and want to install it, click here...
Click here to install the following ActiveX control: 'Crystal Smart Viewer for ActiveX' from 'Crystal
Install ActiveX Control...
What's the Risk?
More information

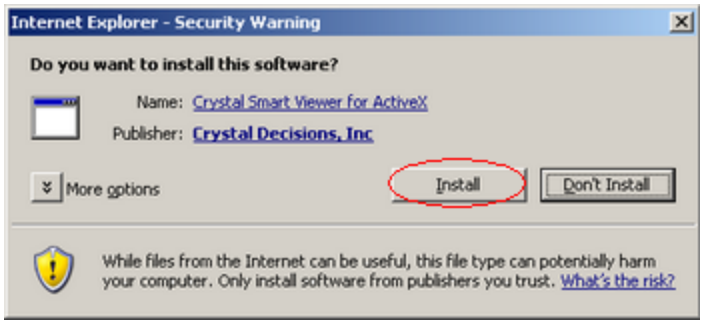
Install ActiveX Control

3. A pop-up box may appear asking you to display the webpage again. Click on Retry to refresh the page.


Windows Internet Explorer
To display the webpage again, Internet Explorer needs to resend the information you've previously submitted.
If you were making a purchase, you should click Cancel to avoid a duplicate transaction. Otherwise, click Retry to display the webpage again.
Retry
Cancel

Retry Box

4. Another pop-up box will appear asking you if you want to install the viewer. Click on the Install button to begin the installation process.


Internet Explorer - Security Warning
Do you want to install this software?
Name: Crystal Smart Viewer for ActiveX
Publisher: Crystal Decisions, Inc
More options
Install
Don't Install
While files from the Internet can be useful, this file type can potentially harm your computer. Only install software from publishers you trust. What's the risk?

Install ActiveX Box

1.7 Installing DBPIX Attachment Plug-In

Before you can use the Attachment feature in eDirectGlass, you must first configure your computer and Internet Explorer.

1. When you first click on the Add Attachment button, a new browser window will appear asking you to install the 'dbpix20.ocx' plug-in.
2. Click on the yellow highlighted area and a drop-down box will appear. Select 'Install ActiveX Control...'

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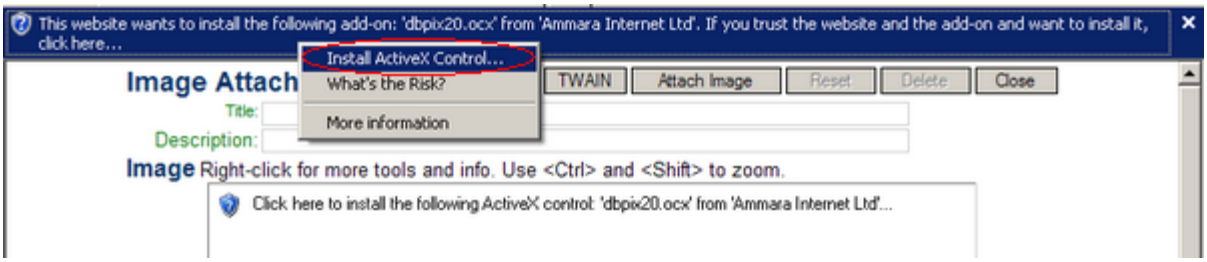
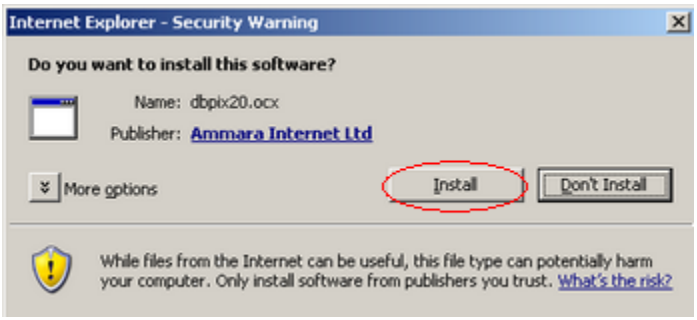

This website wants to install the following add-on: 'dbpix20.ocx' from 'Ammara Internet Ltd'. If you trust the website and the add-on and want to install it, click here...
Install ActiveX Control...
What's the Risk?
More information
Image Attach
TWAIN
Attach Image
Reset
Delete
Close
Title:
Description:
Image
Right-click for more tools and info. Use <Ctrl> and <Shift> to zoom.
Click here to install the following ActiveX control: 'dbpix20.ocx' from 'Ammara Internet Ltd'...

Image Attachment ActiveX

3. A pop-up box will come up asking you if you want to install the software. Click on the Install button to being the installation process.


Internet Explorer - Security Warning
Do you want to install this software?
Name: dbpix20.ocx
Publisher: Ammara Internet Ltd
More options
Install
Don't Install
While files from the Internet can be useful, this file type can potentially harm your computer. Only install software from publishers you trust. What's the risk?

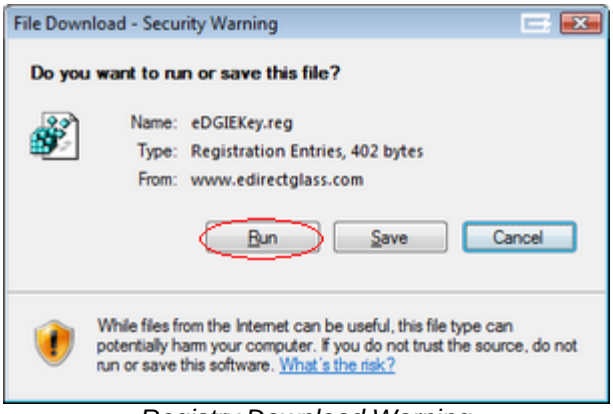
Install ActiveX Box

4. When the installation is complete, you will see the Image Attachment interface screen.

1.8 Configure the Registry of Attachments

1. Download the following file and when prompted, choose 'Run':

http://www.edirectglass.com/downloads/eDGIEKey.reg


File Download - Security Warning
Do you want to run or save this file?
Name: eDGIEKey.reg
Type: Registration Entries, 402 bytes
From: www.edirectglass.com
Run
Save
Cancel
While files from the Internet can be useful, this file type can potentially harm your computer. If you do not trust the source, do not run or save this software. What's the risk?

Registry Download Warning

2. Your system may prompt you to allow the update to the registry to occur. Click 'Allow', 'Yes', or 'OK' to any of these prompts until you get a message telling you that the update took place.

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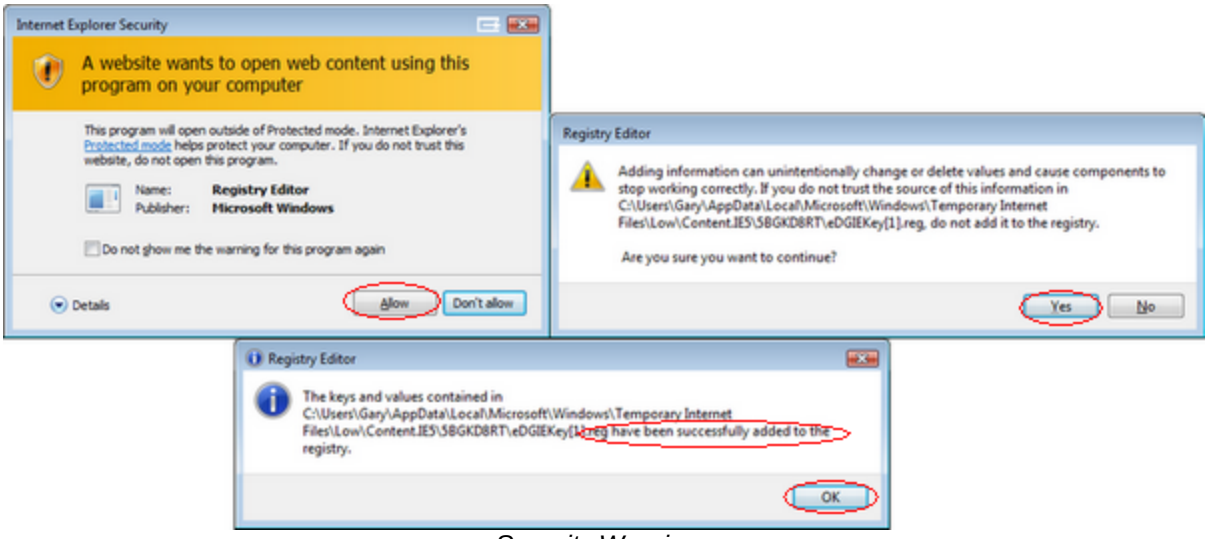

Internet Explorer Security
A website wants to open web content using this program on your computer
This program will open outside of Protected mode. Internet Explorer's Protected mode helps protect your computer. If you do not trust this website, do not open this program.
Name: Registry Editor
Publisher: Microsoft Windows
Do not show me the warning for this program again
Details
Allow
Don't allow
Registry Editor
Adding information can unintentionally change or delete values and cause components to stop working correctly. If you do not trust the source of this information in C:\Users\Gary\AppData\Local\Microsoft\Windows\Temporary Internet Files\Low\Content.IE5\5BGKD8RT\eDGIEKey[1].reg, do not add it to the registry.
Are you sure you want to continue?
Yes
No
Registry Editor
The keys and values contained in C:\Users\Gary\AppData\Local\Microsoft\Windows\Temporary Internet Files\Low\Content.IE5\5BGKD8RT\eDGIEKey[1].reg have been successfully added to the registry.
OK

Security Warnings

3. Open up Internet Explorer and you can begin using the Attachments feature.

1.9 Connecting to eDirectGlass

Before you can connect to eDirectGlass, you must first complete the following steps:

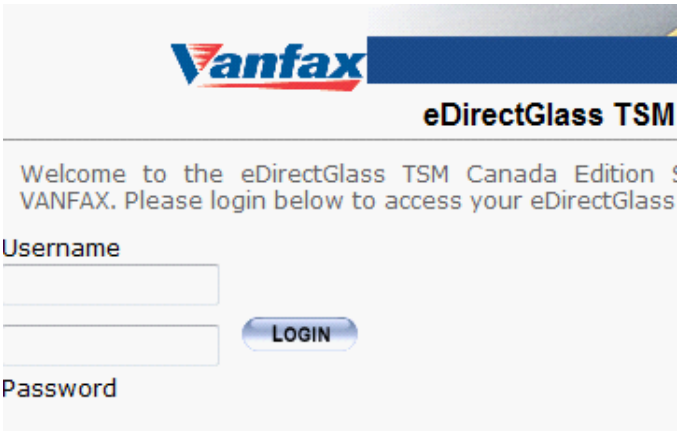
1. Connect to the Internet (Not required for broadband or LAN Internet services).
2. Launch Internet Explorer.
3. Have your Account Login Information as delivered to you by eDirectGlass via Fax or Mail.

Once you have completed these three steps, you may proceed to connecting to eDirectGlass.

1.9.1 Login

In order to connect to your eDirectGlass account, you must first login.

1. In the address bar of Internet Explorer, type the following URL: http://www.edirectglass.ca.ca or the web address given to you by eDirectGlass or your eDirectGlass Administrator.
2. Once the address has been entered, the login screen should be visible.



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Portion of Login Screen

3. In the 'Login Name' box, enter the username that has been provided to you by eDirectGlass or your eDirectGlass Administrator.
4. In the 'Password' box, enter the password that has been provided to you by eDirectGlass or your eDirectGlass Administrator.
5. Click on the

button to login to your eDirectGlass account.

1.9.2 Log Off

To Log Off of the eDirectGlass system or to login under a different username, click on the

button underneath the username in the upper right-hand corner of the screen.

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Part 2

2 eDirectGlass Administration

DO NOT SKIP THIS STEP

If this is the first time you have logged in to your eDirectGlass account, you must verify your shop information. If you fail to complete the Administration review and setup, you may jeopardize your ability to create, manage and submit invoices.

2.1 Shop Administration

1. From the eDirectGlass Main Screen, click on the Administration button.
2. On the Administration Sub Menu, click on the System Admin button.
3. In the Shop Detail window, make sure that your company contact information, email address, account & warehouse information and labor rate are correct. You ***must*** enter an-email address in order to process orders with VANFAX. You ***must*** enter your per hour labor rate.
4. Enter in your Starting Invoice #. You will not be able to restart this number once you enter a Starting Invoice #, you can move it forward, but cannot go back.
5. If you wish to track your inventory in eDirectGlass, change the radio button selection to Yes.
6. If the My Work Prompt is set as Yes, the system will ask you each time you leave a record whether you wish to add that record to your My Work list. If the My Work Prompt is set as No, each record will automatically be added to your My Work list when you leave that record.
7. If you plan on allowing a deductible/promotional discount to be applied to the owner's portion of the invoice, you must fill out the maximum amount of a discount that you will allow your employees to give to a customer in the Deductible Discount Max field and the text you wish to appear on the customer's deductible invoice in the Discount Text .

   NOTE: Even if you will not limit the amount of a discount your employees can give to a customer, you must enter an amount in this field. Just make it a large enough amount (e.g., $900) so there will be no restrictions.

Shop Detail - Contact and Labor Information

8. In the next section, make sure you enter your tax ID and rate information. If you are in PE, check off the box next to PEI and the taxes will be applied appropriately.

Shop Detail - Tax ID and Rates

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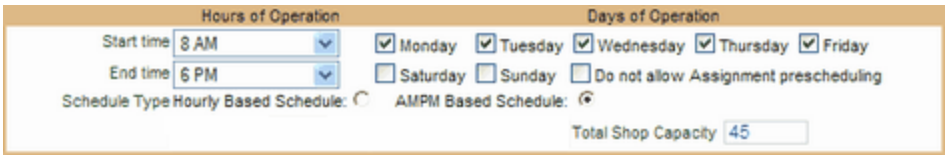
9. The next Shop Detail configuration is your hours and days of operation. In addition, eDirectGlass can publish your operation hours and days to your business partners. This feature allows them to "pre-schedule" assignments. If you do not want to participate in this feature, please check the ☑ Do not allow Assignment prescheduling check-box.

   Note: The total Daily Job Capacity for all of your technicians *(see User Administration)* will be used by the system to calculate the Total Shop Capacity (you do not/should not enter anything into this field).

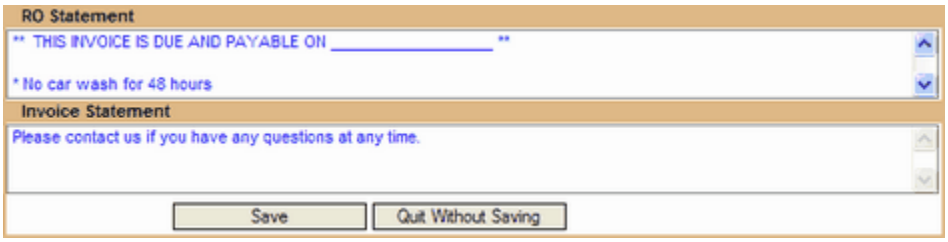
   a. Hourly Based Schedule - allows you to schedule your jobs based on the actual time it would take to complete the job (including driving time). The schedule screens for Hourly Based Scheduling are divided into 15 minute increments.
   b. AM/PM Based Schedule - takes the total of the Daily Job Capacity you have entered for all of your technicians, divides that number by two and gives you that number of AM slots and that number of PM slots (e.g., you have 4 Technicians each capable of doing 5 jobs a day giving you a total Daily Job Capacity of 20; the system will list 10 AM and 10 PM jobs for each day). When you have scheduled all of the available slots, the system will alert you that you can no longer take jobs for that day.

   NOTE: Once you determine which Schedule Type you will be using, you should avoid switching back to the other type to avoid scheduling conflicts and lost jobs.


Hours of Operation
Days of Operation
Start time 8 AM
End time 6 PM
Monday Tuesday Wednesday Thursday Friday
Saturday Sunday Do not allow Assignment prescheduling
Schedule Type Hourly Based Schedule:
AMPM Based Schedule:
Total Shop Capacity 45

Shop Detail - Hours and Days of Operation

10. The final Shop Detail configuration is information you wish to have printed at the bottom of your ROs and Invoices. Enter the text you wish to appear on all of your print outs in the appropriate section. **IF YOU ARE USING PRE-PRINTED APPLE INVOICES, SKIP THIS STEP.**


RO Statement
** THIS INVOICE IS DUE AND PAYABLE ON _____ **
* No car wash for 48 hours
Invoice Statement
Please contact us if you have any questions at any time.
Save
Quit Without Saving

RO & Invoice Statements

11. When you are satisfied that all of the information is accurate, click the Save button.

2.2 User Administration

To add or maintain users for your eDirectGlass account, click on the User Mgmt button.

NOTE: You must enter in a User for all technicians and sales people to whom you wish to assign jobs. You must create a username and

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password for them even if you do not intend to give them access to the eDirectGlass system.

2.2.1 Adding a New User

1. In the Find User box, click on the [Add User] button.

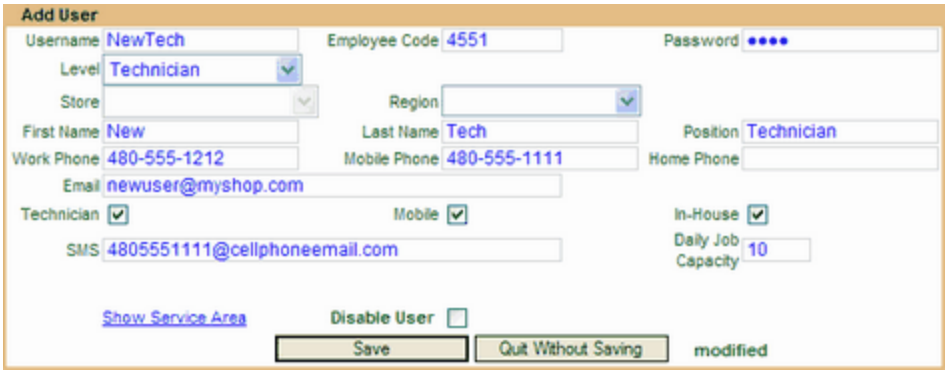
2. In the Add User window, enter a Username and Password.

3. Select the User's level:
   Training
   Manager
   CSR
   Admin
   Sales Person
   Technician
   NOTE: Until you modify the user rights *(see User Rights section of this manual)*, they will not have access to any area of eDirectGlass.

4. If the user is a technician select whether they are Mobile ☐, In-House ☐ or both and also enter in their Daily Job Capacity if you are a shop that is AM/PM based. The total Daily Job Capacity for all of your technicians will be used to determine the total daily job capacity for your shop.

5. Also, if the user is a technician, the SMS box will display. This function allows the system to alert the user of jobs that have been added to their schedule on the same business day. If you enter the correctly formatted SMS email address (i.e., 4805551111@cellphoneemail.com), a notice will be sent directly to the technician's cellphone via text message telling them a job has been added and that they need to check their schedule for today.

6. Enter the First and Last name, position, phone and email information and click on the [Save] button.



Add User Window

2.2.2 Maintaining Users

1. In the Find User box, enter a username, first name or last name then click on the [Find User] button. To see all users for your account, just click on the [Find User] button without entering any names.
2. From the User List window, click on the name you wish to maintain.

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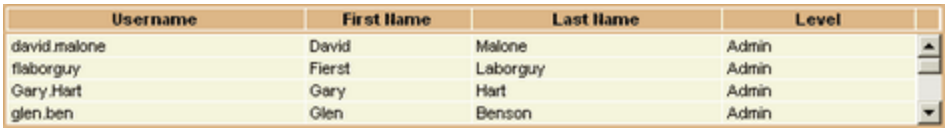
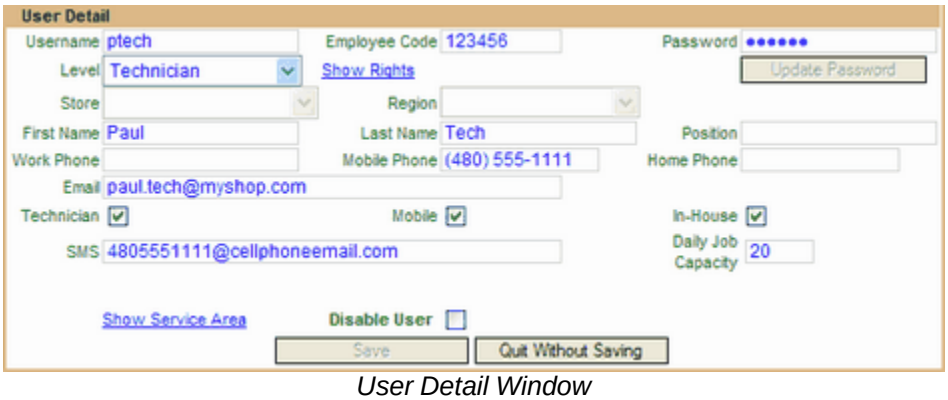


User List Window

3. In the User Detail window, make the changes required, then click on the Save button. **NOTE: If you need to disable a user for any reason, all you have to do is check off the Disable User box and then click on the Save button. This will deny them access to the entire system. If you do not want to make any changes, click the Quit Without Saving button.**



User Detail Window

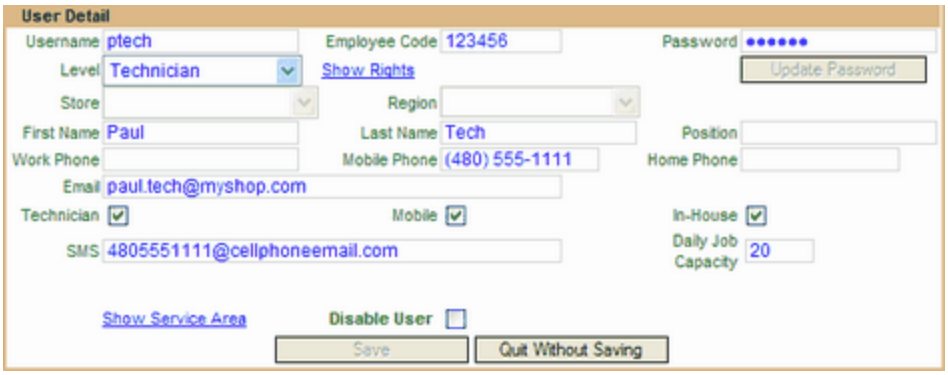
2.2.3 User Rights

This function allows the system administrator to assign the level of access for each user.

1. In the Find User box, enter a username, first name or last name then click on the Find User button. To see all users for your account, just click the Find User button without entering any names.

User List Window

2. From the User List window, click on the name you wish to maintain to bring up the User Detail window in the Work Area.



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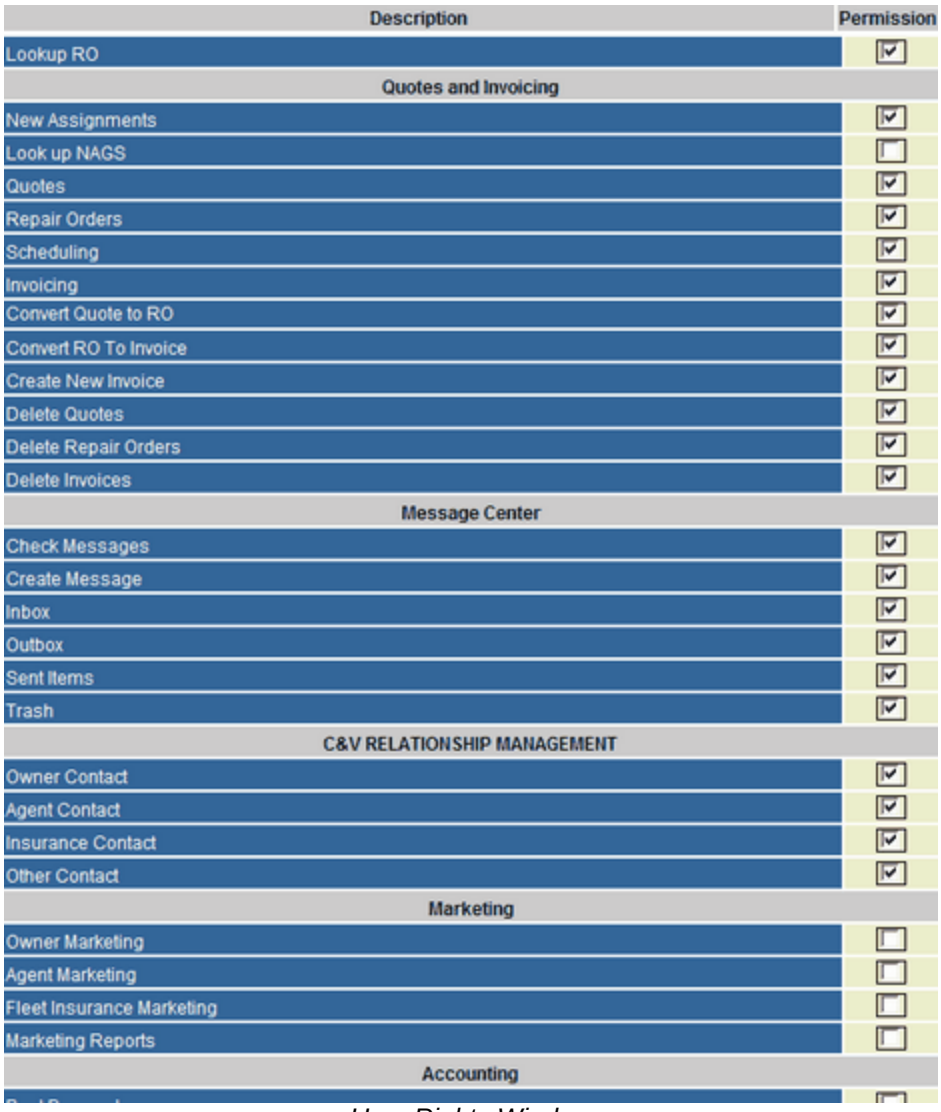
User Detail Window

3. Click on the Show Rights link next to the Level drop down list to display the User Rights window in the Work Area.



User Rights Window

4. The user will be able to access and change information in all areas which have a check mark in the Permission column. To deny user access to a specific area (e.g., Invoicing) remove the check mark from the Permission column.

5. When you have finished making the necessary changes to the user's rights, click on the Save Changes button. If you do not wish to make any changes at this time, click on the Quit Without Saving button.

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2.3 Commission & Writers

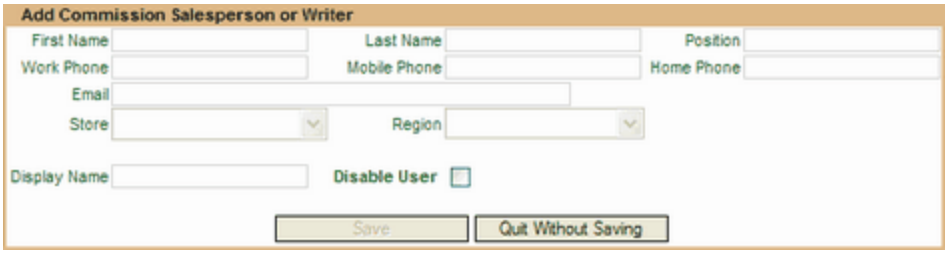
The eDirectGlass system allows you to enter users to be used to track up to three different commission amounts on an individual invoice basis. You will first need to set up the list of people who are eligible for commission payments. To add or maintain these records click on Administration button and then click on the User Mgmt button. This will display the Commission & Writers button under the Administration Sub Menu.

2.3.1 Adding a New Commission & Writers Entry

1. Once you have clicked on the Commission & Writers button in the Administration Sub Menu, the Find Commission Salesperson or Writer window will display in the Work Area. To begin adding a new entry, click on the Add User button.

Find Commission Salesperson or Writer Window

2. The Add Commission Salesperson or Writer window will now appear in the Work Area for you to complete.

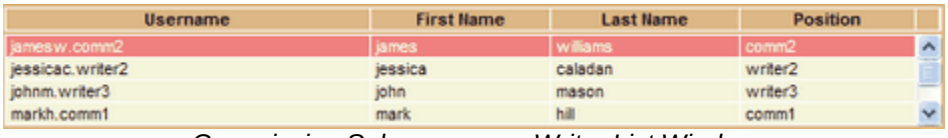


Add Commission Salesperson or Writer Window

3. Once you have filled out all of the information, click on the Save button.

2.3.2 Maintaining Commission & Writers Entries

1. In the Find Commission Salesperson or Writer box, enter a username, first name or last name then click on the Find User button. To see all users for your account, just click on the Find User button without entering any names.
2. From the Commission Salesperson or Writer List window, click on the name you wish to maintain.



Commission Salesperson or Writer List Window

3. In the Commission Salesperson or Writer Detail window, make the changes required, then click on the Save button. **NOTE: If you need to disable a user for any reason, all you have to do is check off the Disable User box and then click on the Save button. This will remove them from the drop-down list used to assign commission to an invoice. If you do not want to make any changes, click the Quit Without Saving button.**

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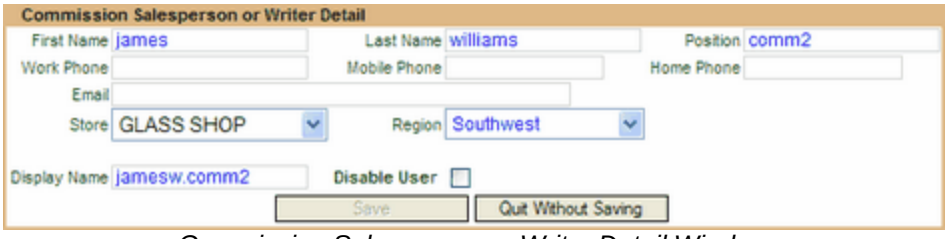
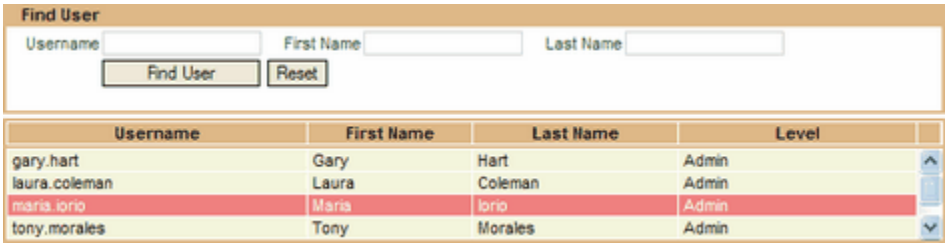


Commission Salesperson or Writer Detail Window

2.4 Search Results Settings

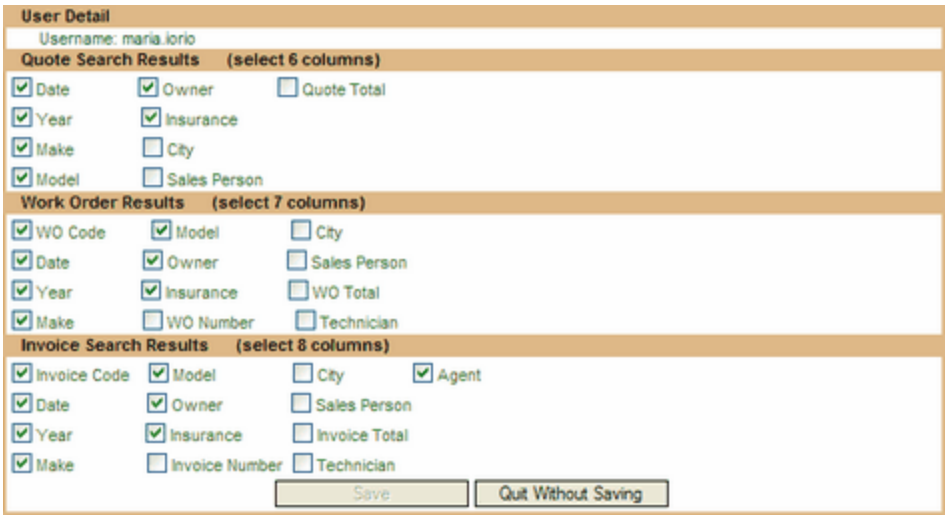
eDirectGlass allows the system to show different Search Results in the Find windows of the Quote, Work Order and Invoice sections. These listings are based on the user login and can be different for each. To set these results do the following:

1. Click on the Administration button then click on the User Mgmt button to activate the Search Result Settings button. Once you have clicked on the Search Result Settings button, you will need to select a user just as in the Maintaining Users section.
2. Enter your search criteria to find a specific entry or just click on the Find User button to display the entire list of users. Click on the user for which you wish to change the search result screens.



Find User Window

3. Click on the user for which you wish to change the search result screens to display the Search Results Settings window in the Work Area.



Search Results Settings Window

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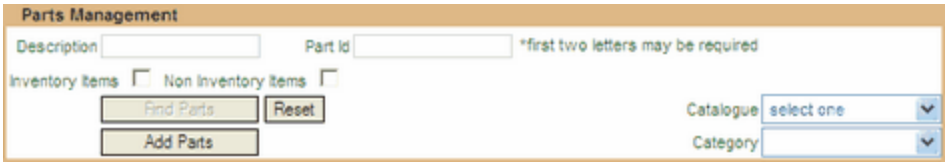
4. Once you have made the changes to the user's Search Results Settings, Click on the Save button to apply the changes.

2.5 Parts Admin

This section will allow you to add and maintain custom/special parts and inventory.

1. From the eDirectGlass Main Screen, click the Administration button.
2. On the Administration Sub Menu, click on the Parts Admin button.
3. The Parts Management window will be displayed in the Work Area.

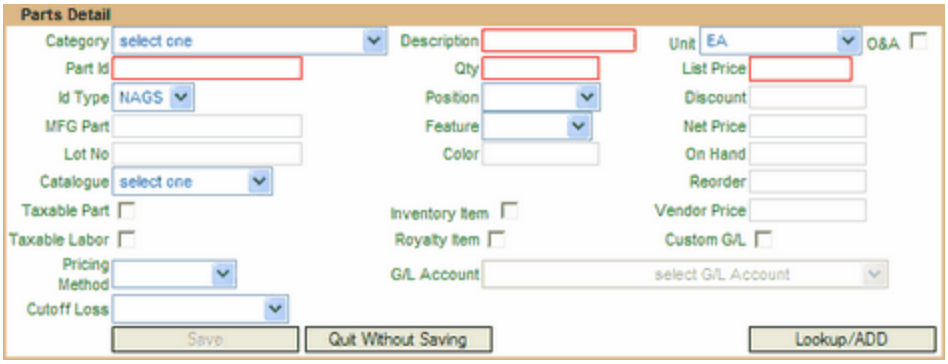


Parts Management Window

4. At this point, you can either choose the Add Parts button to create a new part or choose a Catalogue and Category and click on the Find Parts button to maintain an existing part. You can also choose to show only Inventory or Non Inventory Items by selecting the correct check box.

2.5.1 Adding a New Part

1. In the Parts Management window, click on the Add Parts button to display the Parts Detail window in the Work Area.



Parts Detail Window

2. You must select a Category, enter a Description, Part Id, Qty, List Price and select a Catalogue before the record can be saved. **NOTE: The Item Type is what will be displayed in the drop down list when adding parts to a Record.**
3. After you have entered and verified that all of the information is correct, click on the Save button to add the new record. **NOTE: Make sure you check off the** Taxable ☑ **button (Part or Labor) if the item is taxable.**

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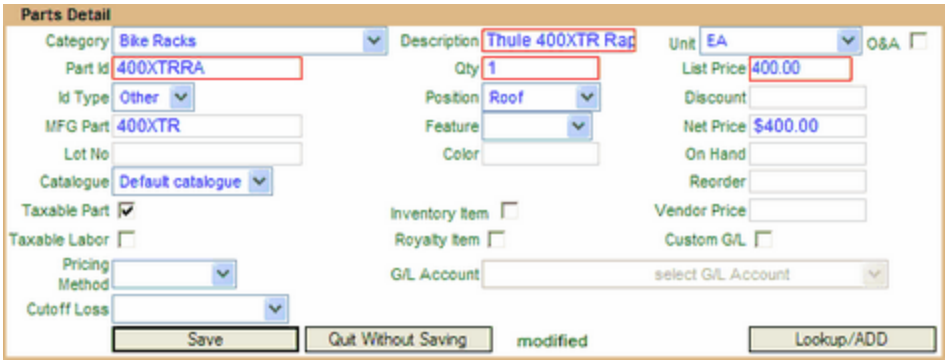


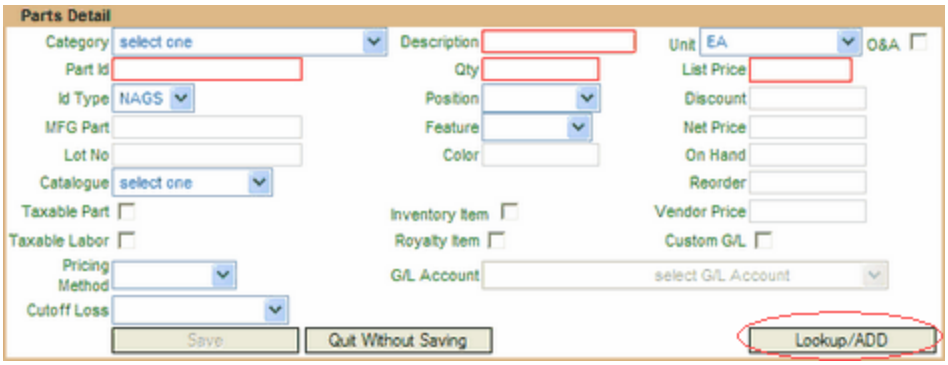
Completed Parts Detail Window

NOTE: If you will be tracking inventory for this part, you MUST check off the Inventory Item box and fill out the On Hand, Reorder and Vendor Price boxes. If the On Hand box is not showing, check in System Admin to make sure Track Inventory is marked 'Yes'.

2.5.1.1 Lookup/ADD

You may also create a new part based on a NAGS part using the Lookup/ADD button.

1. After you click on the Add Parts button, you will find the Lookup/ADD button in the bottom right corner of the Parts Detail window.



Parts Detail Window

2. Once you click on the Lookup/ADD button, you will be taken to the Vehicle Build window. Once you have chosen the Make, Model, Year, Body Style and Submodel, click on the SEARCH button to list the NAGS glass parts associated with this vehicle.

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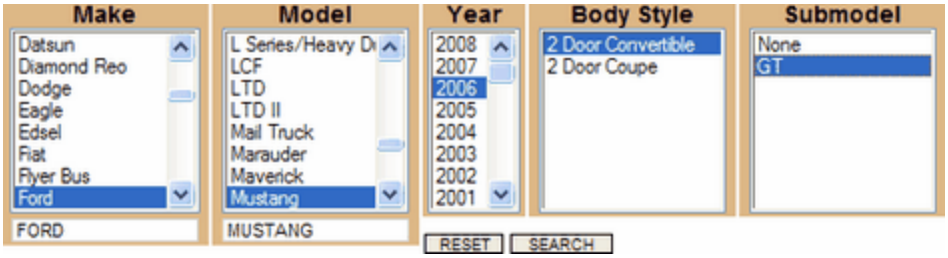
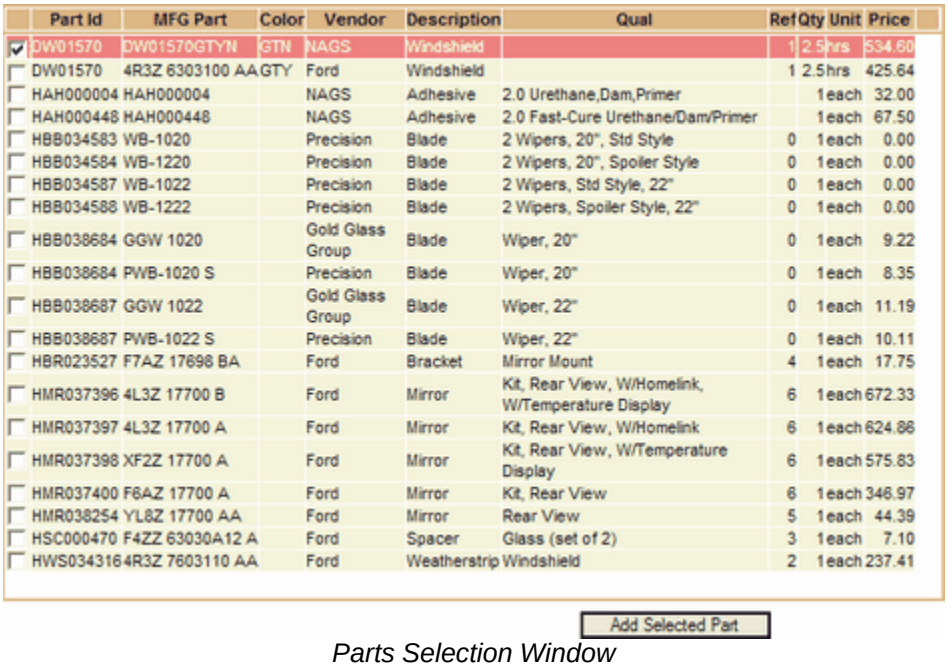


Vehicle Build Window

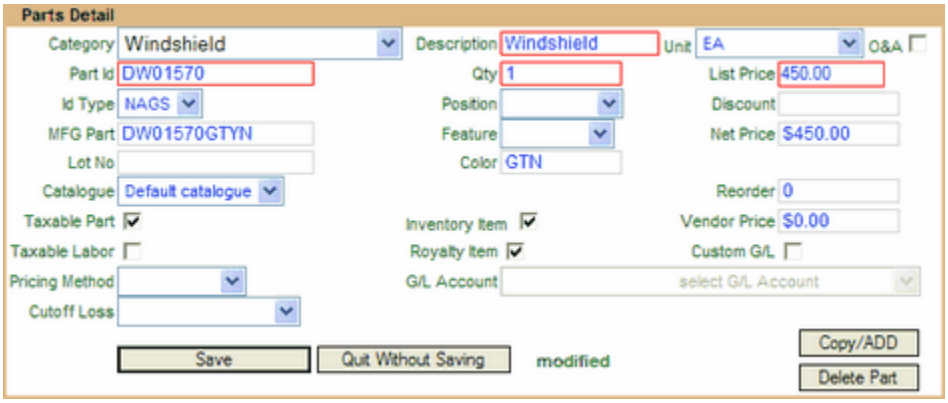
3. Select the glass part (i.e., windshield, door glass, etc.) to list all of the parts associated with this item. Put a check next to the item you wish duplicate in your local catalogue, and click on the Add Selected Part and you will be taken to Parts Detail Screen.



	Part Id	MFG Part	Color	Vendor	Description	Qual	Ref	Qty	Unit	Price
☑	DW01570	DW01570GTYN	GTN	NAGS	Windshield		1	2.5	hrs	534.60
☐	DW01570	4R3Z 6303100 AA	GTY	Ford	Windshield		1	2.5	hrs	425.64
☐	HAH000004	HAH000004		NAGS	Adhesive	2.0 Urethane,Dam,Primer		1	each	32.00
☐	HAH000448	HAH000448		NAGS	Adhesive	2.0 Fast-Cure Urethane/Dam/Primer		1	each	67.50
☐	HBB034583	WB-1020		Precision	Blade	2 Wipers, 20", Std Style	0	1	each	0.00
☐	HBB034584	WB-1220		Precision	Blade	2 Wipers, 20", Spoiler Style	0	1	each	0.00
☐	HBB034587	WB-1022		Precision	Blade	2 Wipers, Std Style, 22"	0	1	each	0.00
☐	HBB034588	WB-1222		Precision	Blade	2 Wipers, Spoiler Style, 22"	0	1	each	0.00
☐	HBB038684	GGW 1020		Gold Glass Group	Blade	Wiper, 20"	0	1	each	9.22
☐	HBB038684	PWB-1020 S		Precision	Blade	Wiper, 20"	0	1	each	8.35
☐	HBB038687	GGW 1022		Gold Glass Group	Blade	Wiper, 22"	0	1	each	11.19
☐	HBB038687	PWB-1022 S		Precision	Blade	Wiper, 22"	0	1	each	10.11
☐	HBR023527	F7AZ 17698 BA		Ford	Bracket	Mirror Mount	4	1	each	17.75
☐	HMR037396	4L3Z 17700 B		Ford	Mirror	Kit, Rear View, W/Homelink, W/Temperature Display	6	1	each	672.33
☐	HMR037397	4L3Z 17700 A		Ford	Mirror	Kit, Rear View, W/Homelink	6	1	each	624.86
☐	HMR037398	XF2Z 17700 A		Ford	Mirror	Kit, Rear View, W/Temperature Display	6	1	each	575.83
☐	HMR037400	F6AZ 17700 A		Ford	Mirror	Kit, Rear View	6	1	each	346.97
☐	HMR038254	YL8Z 17700 AA		Ford	Mirror	Rear View	5	1	each	44.39
☐	HSC000470	F4ZZ 63030A12 A		Ford	Spacer	Glass (set of 2)	3	1	each	7.10
☐	HWS034316	4R3Z 7603110 AA		Ford	Weatherstrip	Windshield	2	1	each	237.41

Parts Selection Window

4. Select the correct Catalogue and Category and make any other changes then click on the Save button to add this new item to your Catalogue.



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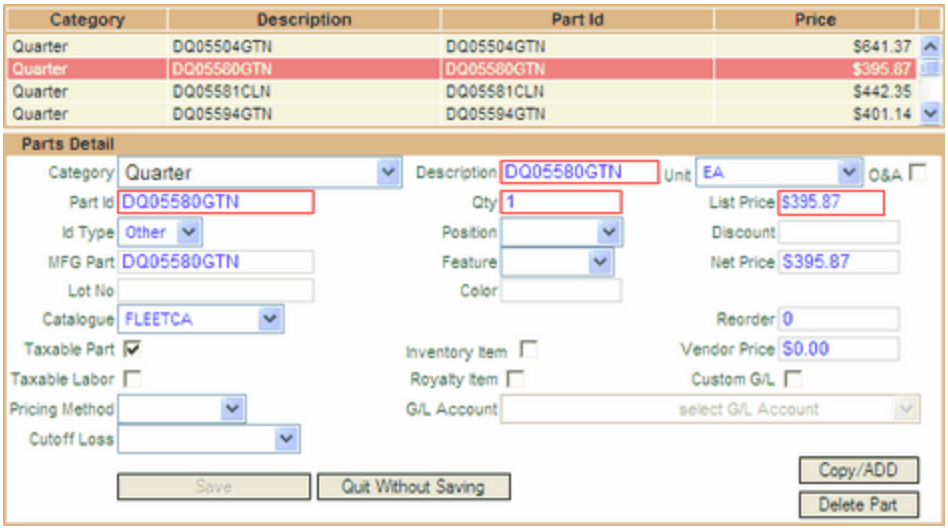
2.5.1.2 Copy/ADD

You may also make a copy of an existing part and save it to another catalogue or make other changes.

1. In the Parts Management field, select the search criteria for the item you are looking up and click on the Find Parts button. You will need to select the Catalogue and Category and you may need to enter the first two letters of the part you are looking up to make the Find Parts button active.

Find Parts Window

2. Click on the part you wish to copy from the list to open the Parts Detail window in the Work Area.



Parts List & Parts Detail Window

3. Click on the Copy/ADD *button to bring the information into a new Parts Detail Window. Select the new correct Category and Catalogue and make any other necessary changes to the record then click on the* Save *button to add the record.*

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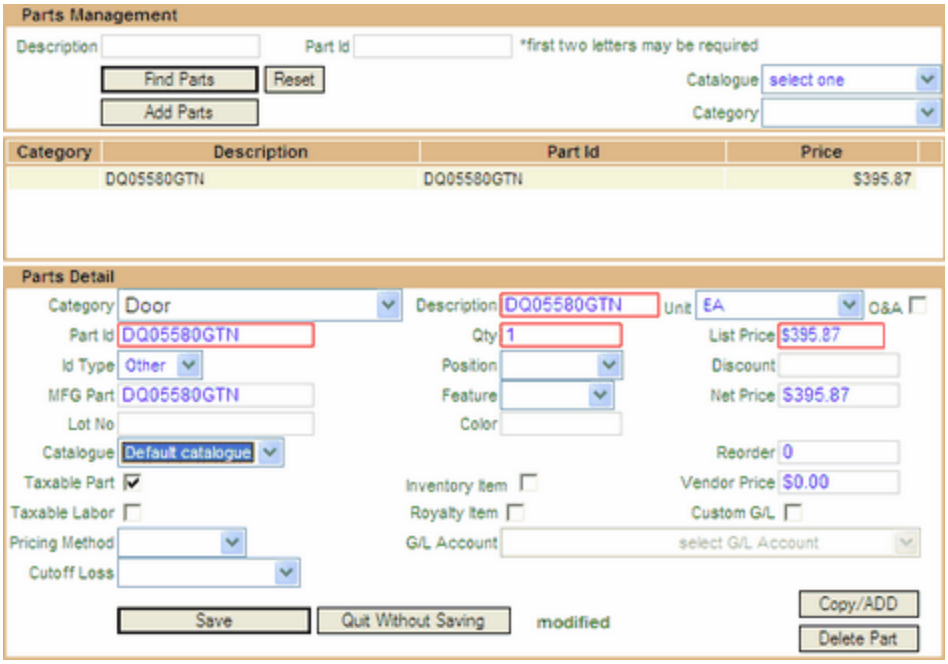
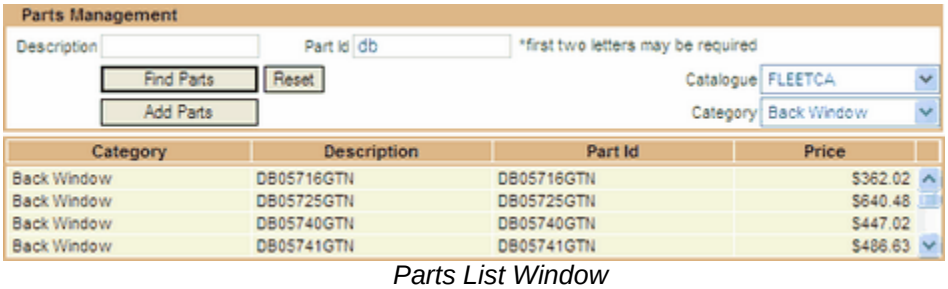


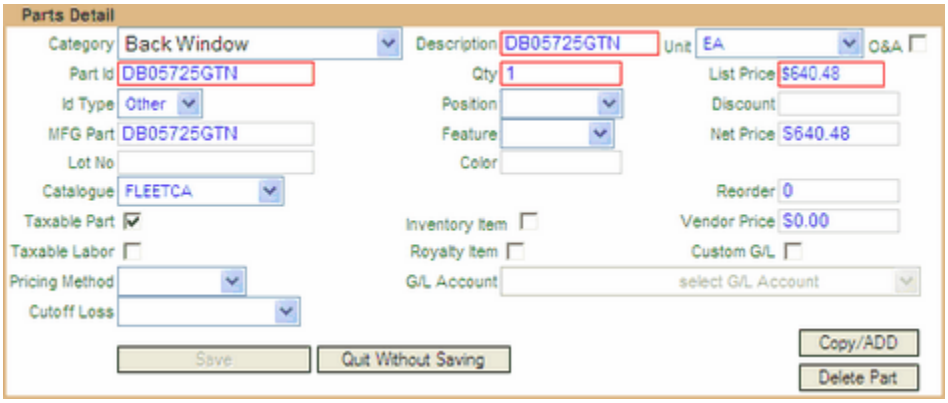
2.5.2 Maintaining Parts Admin

1. In the Parts Management field, select the search criteria for the item you are looking up and click on the Find Parts button. You will need to select the Catalogue and Category and you may need to enter the first two letters of the part you are looking up to make the Find Parts button active.



Parts List Window

2. Highlight the Item you wish to review/maintain to display the Parts Profile Detail window in the Work Area.



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Parts Detail Window

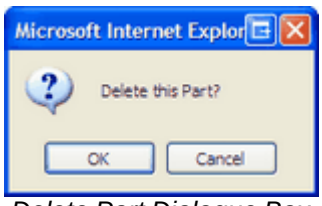
3. You will have three options at this point:

   To **make changes and/or additions** to the information contained in this record and click on the Save button to record the changes.

   To **review** the information without making any changes or additions, then click on the Quit Without Saving button.

   To completely **remove** this Parts Profile Detail Record from your eDirectGlass system by clicking on the Delete Part button.

NOTE: Once you click on the Delete Part button, you will see a dialogue box verifying your desire to delete the record, if you choose OK, the record will be permanently removed from your eDirectGlass system.



Delete Part Dialogue Box

2.5.3 Catalogues

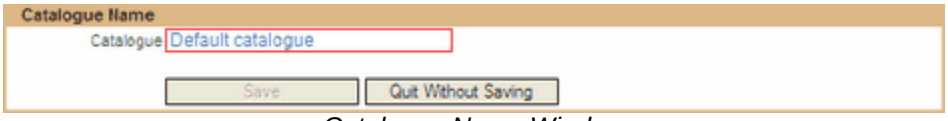
They system is load with some pre-populated Catalogues, but you can also create your own local catalogues.

1. Click on the Administration button then click on Parts Admin button. The Catalogues button will appear on the left side of the screen under the Administration Submenu.
2. Click on the Catalogues button and the Catalogue Management window will appear in the Work Area.

Catalogue Management Window

3. At this point you can either find an existing Catalogue and update the name or create a new Catalogue name to use with your Parts Admin.

4. To update and existing Catalogue click on the Find Catalogue button and click on the Catalogue you wish to update to open the Catalogue Name window in the Work Area.



Catalogue Name Window

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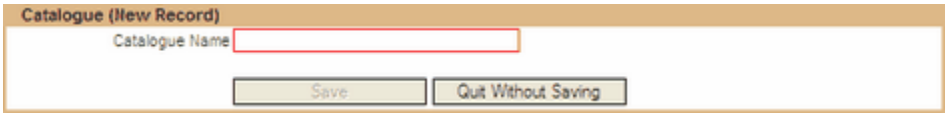
5. Update the Catalogue Name and click on the Save button to apply the change or click on the Quit Without Saving button to leave the record without making any change.

6. To create a new Catalogue name click on the Add Catalogue button to display the Catalogue (New Record) window in the Work Area.



Catalogue (New Record) Window

7. Enter the name of the new Catalogue you would like to use then click on the Save button to add this Catalogue name for your use.

2.5.4 Categories

They system is load with some pre-populated Categories, but you can also create your own local categories.

1. Click on the Administration button then click on Parts Admin button. The Categories button will appear on the left side of the screen under the Administration Submenu.
2. Click on the Categories button and the Category Management window will appear in the Work Area.

Category Management Window

3. At this point you can either find an existing Category and update the name or create a new Category name to use with your Parts Admin.

4. To update and existing Category click on the Find Category button and click on the Category you wish to update to open the Category Detail window in the Work Area.

Category Detail Window

5. Update the Category and click on the Save button to apply the change or click on the Quit Without Saving button to leave the record without making any change.

6. To create a new Category name click on the Add Category button to display the Category Detail

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(New Record) window in the Work Area.

Category Detail (New Record) Window

7. Enter the name of the new Category Abbreviation & Description and select whether it will be part of the NAGS Price Group then click on the Save button to add this Category for your use.

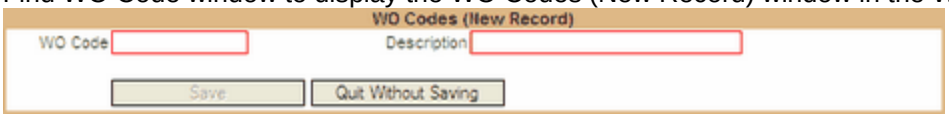
2.6 WO Codes

The eDirectGlass system allows you to add and maintain Work Order (WO) Codes to help you keep track of your outstanding WOs and their status. To access the WO Codes section, click on the Administration button on the Menu Bar to display the Administration Sub Menu. Click on the WO Codes button in the Sub Menu to display the Find WO Code window in the Work Area.

Find WO Code Window

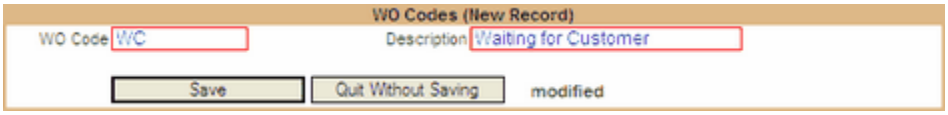
2.6.1 Add WO Codes

To add a new WO Code to your eDirectGlass system, click on the Add WO Code button in the Find WO Code window to display the WO Codes (New Record) window in the Work Area.



WO Codes (New Record) Window

Fill in the appropriate WO Code (up to 12 alpha/numeric characters) and the matching description then click on the Save button to add the new WO Code to your system or click on the Quit Without Saving button if you do not wish to save this record.



Completed WO Codes (New Record) Window

2.6.2 View & Maintain WO Codes

To view and maintain existing WO Codes in your system:

1. Click on the Administration button on the Menu Bar.
2. Click on the WO Codes button on the Sub Menu.
3. Click on the Find WO Code button in the Find WO Code window in the Work Area.

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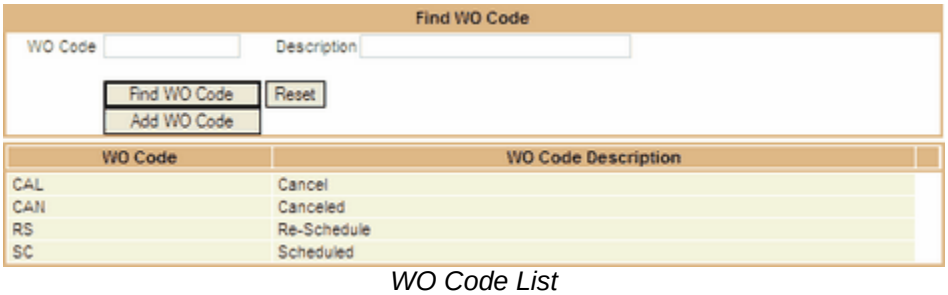
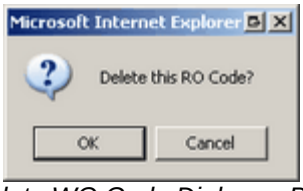
Find WO Code Window.

4. The list of WO Codes and WO Code Descriptions will display in the Work Area.



WO Code List

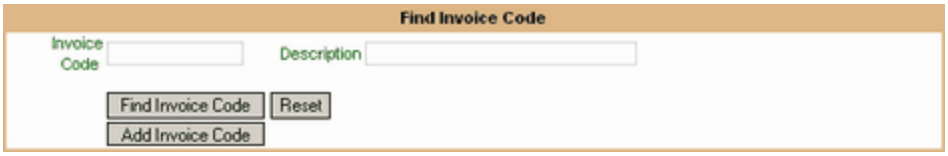
5. To edit or delete a record, click on the line then either enter your changes and click on the Save button or click on the Delete WO Code button to delete the record entirely.
6. If you click on the Delete WO Code button, a dialogue box will appear. To permanently delete the record, click on the OK button.



Delete WO Code Dialogue Box

2.7 Invoice Codes

The eDirectGlass system allows you to add and maintain Invoice Codes to help you keep track of your outstanding Invoices and their status. To access the Invoice Codes section, click on the Administration button on the Menu Bar to display the Administration Sub Menu. Click on the Invoice Codes button in the Sub Menu to display the Find Invoice Code window in the Work Area.



Find Invoice Code Window

2.7.1 Add Invoice Codes

To add a new Invoice Code to your eDirectGlass system, click on the Add Invoice Code button in the Find Invoice Code window to display the Invoice Codes (New Record) window in the Work Area.

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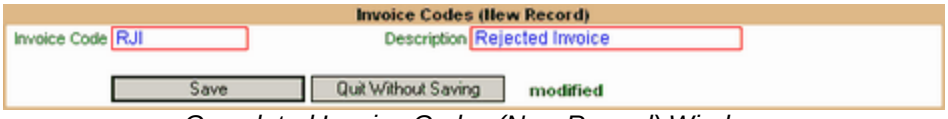
Invoice Codes (New Record) Window

Fill in the appropriate Invoice Code (up to 12 alpha/numeric characters) and the matching description then click on the Save button to add the new Invoice Code to your system or click on the Quit Without Saving button if you do not wish to save this record.

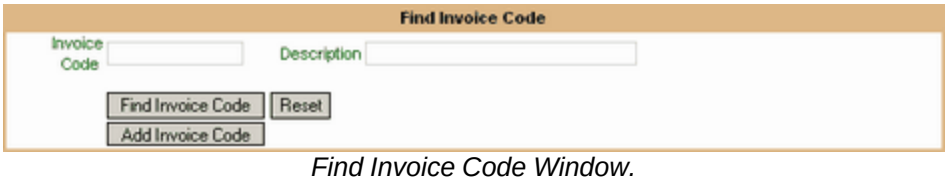


Completed Invoice Codes (New Record) Window

2.7.2 View & Maintain Invoice Codes

To view and maintain existing Invoice Codes in your system:

1. Click on the Administration button on the Menu Bar.
2. Click on the Invoice Codes button on the Sub Menu.
3. Click on the Find Invoice Code button in the Find Invoice Code window in the Work Area.

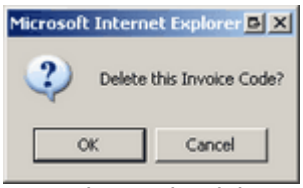


Find Invoice Code Window.

4. The list of Invoice Codes and Invoice Code Descriptions will display in the Work Area.

Invoice Code List

5. To edit or delete a record, click on the line then either enter your changes and click on the Save button or click on the Delete Invoice Code button to delete the record entirely.
6. If you click on the Delete Invoice Code button, a dialogue box will appear. To permanently delete the record, click on the OK button.



Delete Invoice Code Dialogue Box

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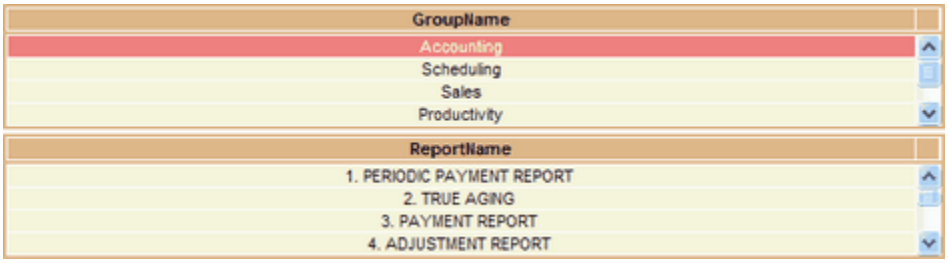
2.8 Reports

The eDirectGlass has a number of reports that be able to assist your company in it's day to day operations.

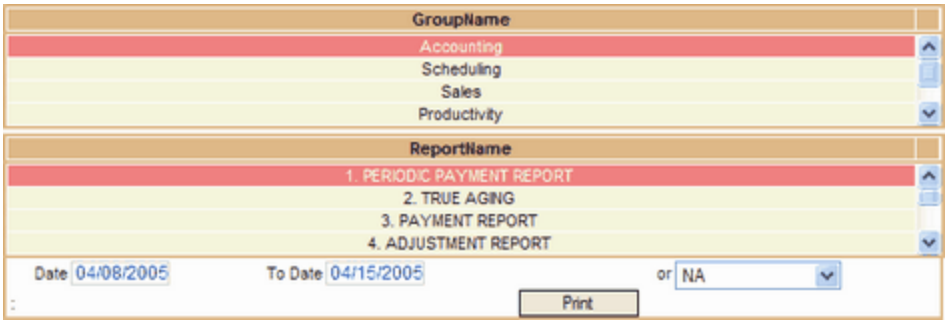
NOTE: Please make sure you follow all of the set up items under *Installing Crystal Report Viewer* of this manual and Print a Quote, Work Order or Invoice before you try pulling up any of these reports.

1. To access the reports section of eDirectGlass, click on the Administration button on the Menu Bar to display the Administration Sub Menu.
2. Click on the Reports button in the Sub Menu to display the reports GroupName list.

3. Select your report type from the GroupName list (i.e., Accounting, Scheduling, Sales, etc.) to display the ReportName list in the Work Area.



4. Select the report you wish to view/print from the ReportName list to display the report criteria in the Work Area.



5. Once you have entered the search criteria, click on the Print button to display the report in the Work Area.

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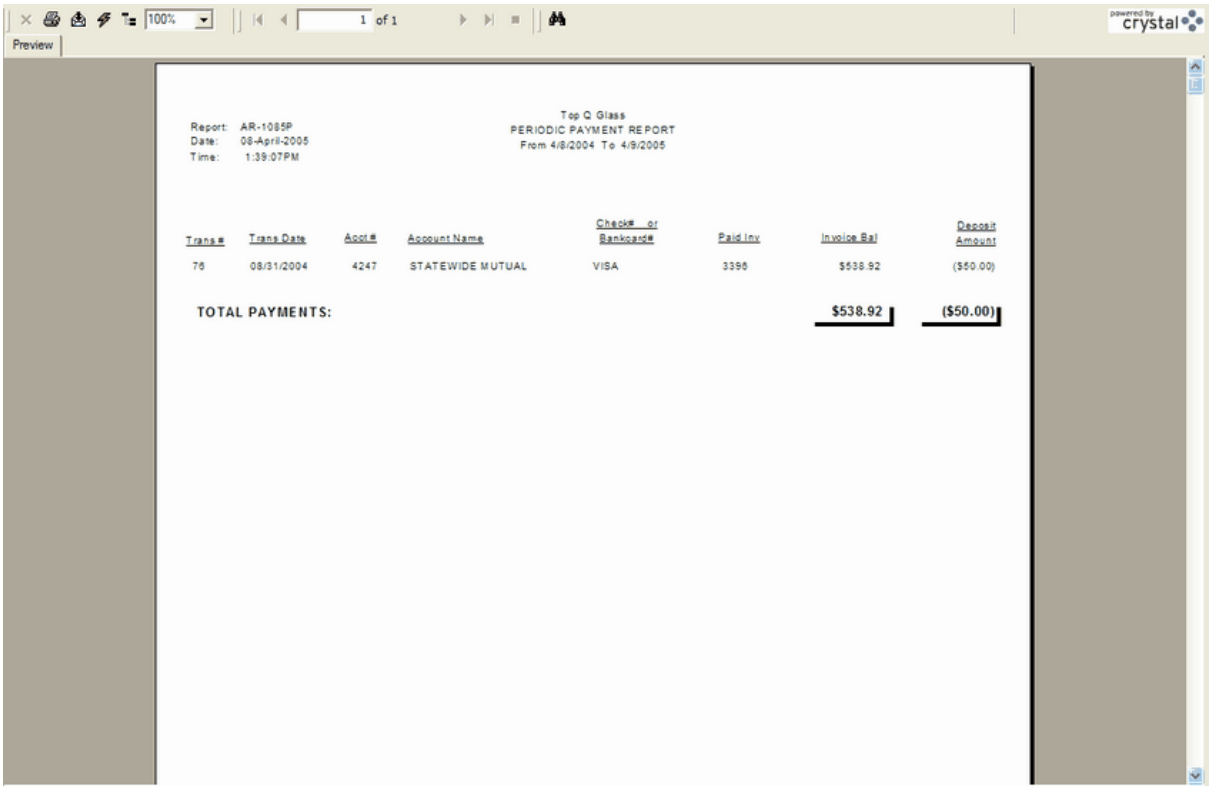

Preview
100%
1 of 1
crystal
Report: AR-1085P
Date: 08-April-2005
Time: 1:39:07PM
Top Q Glass
PERIODIC PAYMENT REPORT
From 4/8/2004 To 4/9/2005
Trans # | Trans Date | Appt # | Account Name | Check# or Bankcard# | Paid Inv | Invoice Bal | Deposit Amount
76 | 08/31/2004 | 4247 | STATEWIDE MUTUAL | VISA | 3395 | $538.92 | ($50.00)
TOTAL PAYMENTS: $538.92 ($50.00)

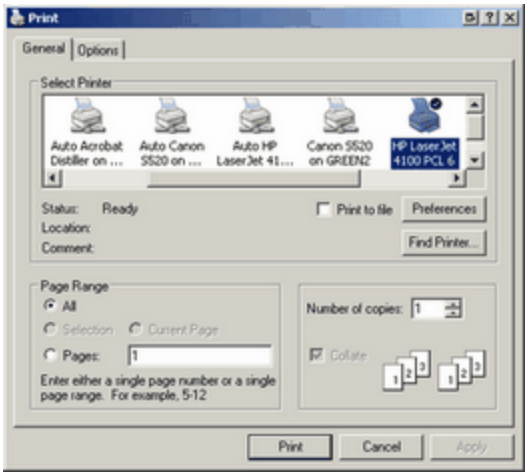
Reports Window

2.8.1 Printing Reports

1. With the report displayed in the Work Area, click on the icon on the report viewer toolbar located under your browser window address bar.

Report Viewer Toolbar

2. A print dialogue box will appear. Select the printer you wish to print to and click on the Print button.



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Print Dialogue Box

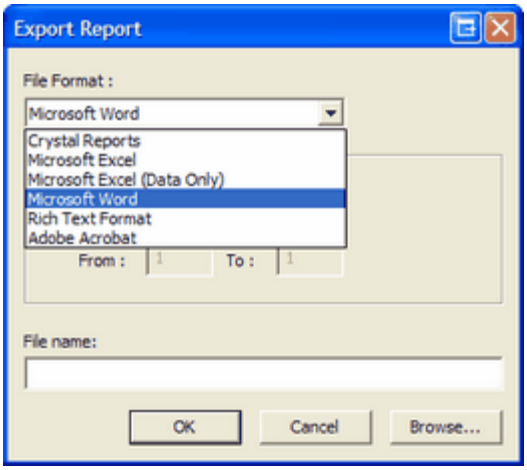
2.8.2 Exporting Reports

You can export any of the reports to another program to be able to further analyze your data.

1. With the report displayed in the Work Area, click on the icon on the report viewer toolbar located under your browser window address bar.

Report Viewer Toolbar

2. In the Export Report box, choose the button. From the Export Report dialogue box, choose the file format (e.g., Excel, Word) for the file export from the drop down menu.



Export Report Dialogue Box

3. Next type in the file name and location in the File Name box or click on the Browse... button to name the file and choose the location where you would like to save the file. Once you have selected a file name and location, click on the Save button.
4. When you have finished, click on the OK button to export and save the report.
5. Once the export is complete, the system will ask you if you wish to open the file. Choose either the Yes or No button.

2.9 Cash Profile

The eDirectGlass system allows you to maintain a Cash Profile to quickly and easily apply your standard cash discount to a quote with just the click of a button. This section will walk you through setting up that profile.

2.9.1 Add Cash Profile

To add a Cash Profile to your eDirectGlass system, click on the Administration button on the Menu Bar to display the Administration Sub Menu. Click on the Cash Profile button to display the blank Shop Cash Discount Parameters window in the Work Area.

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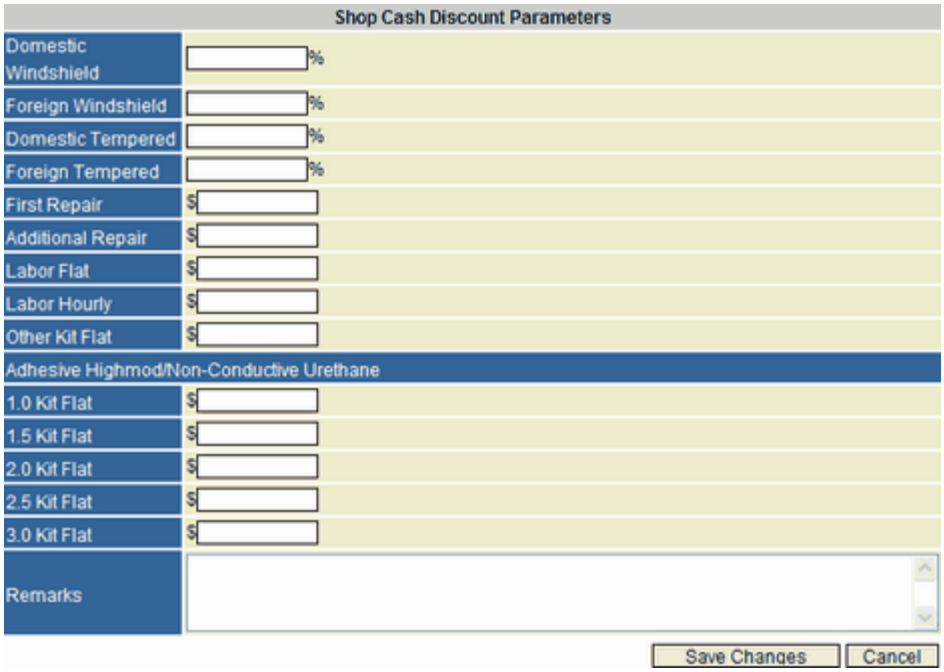
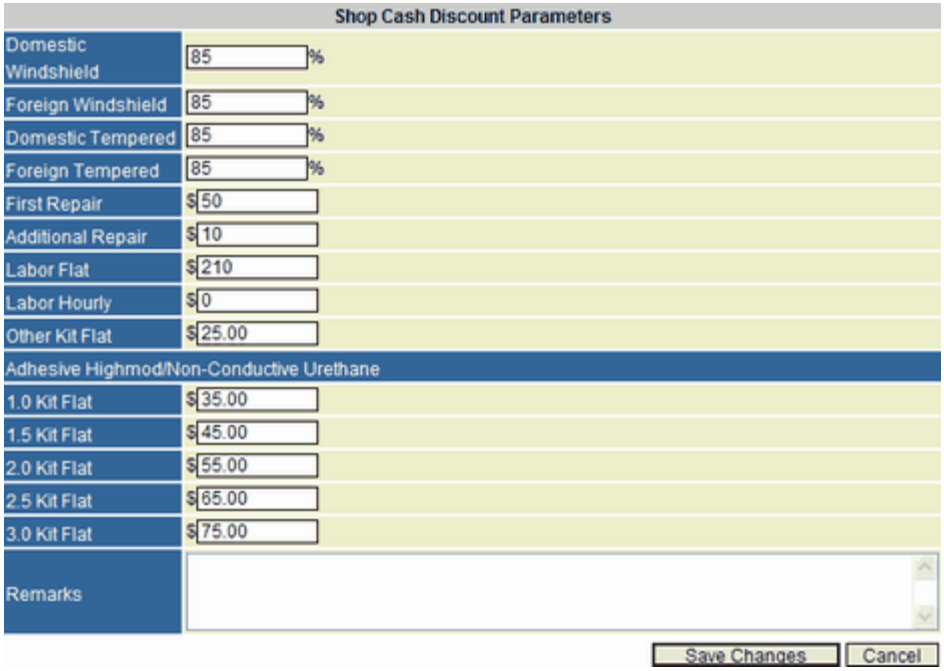


Shop Cash Discount Parameters

Once you have completed all of the information, click on the Save Changes button to save the record or you may click on the Cancel button if you do not wish to save the changes at this time.



Completed Shop Cash Discount Parameters

2.9.2 View & Maintain Cash Profile

To view and maintain an existing Cash Profile in your eDirectGlass system:

1. Click on the Administration button on the Menu Bar to display the Administration Sub

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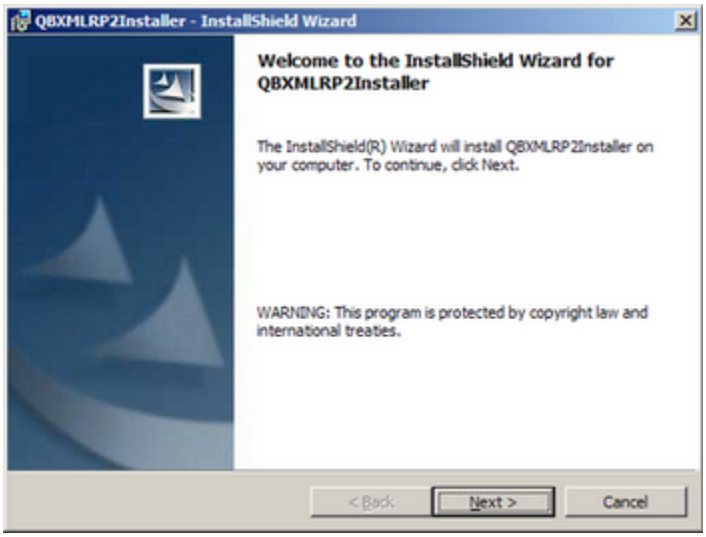
Menu.

2. Click on the Cash Profile button to display the Shop Cash Discount Parameters window in the Work Area.
3. After you have finished your review/updates, click on either the Save Changes button to commit any changes or on the Cancel button to ignore any changes that may have been made.

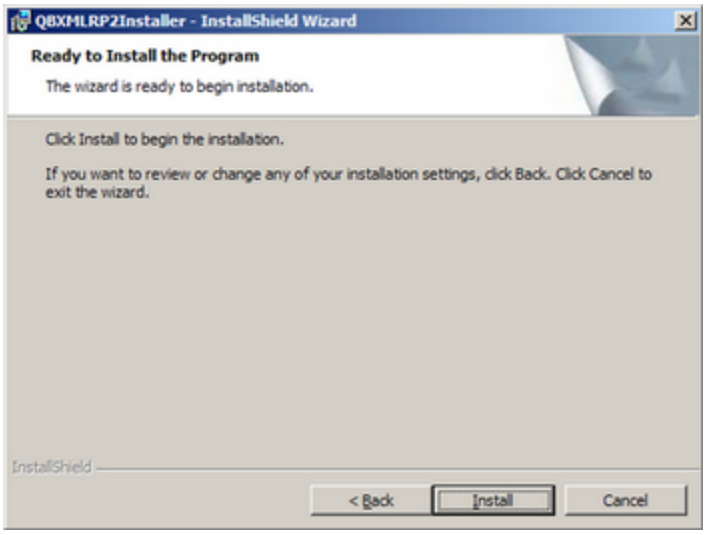
2.10 QuickBooks Setup

Before we begin, make sure all firewall, anti-virus and ad-ware services are disabled until we have completed the setup.

1. Download eDirectGlassQB.zip from http://www.edirectglass.com/downloads/eDirectGlassQB.zip.
2. Unzip the files and first run QBXMLRP2Installer.exe.


QBXMLRP2Installer - InstallShield Wizard
Welcome to the InstallShield Wizard for QBXMLRP2Installer
The InstallShield(R) Wizard will install QBXMLRP2Installer on your computer. To continue, click Next.
WARNING: This program is protected by copyright law and international treaties.
< Back
Next >
Cancel

3. Click on 'Next' to begin the installation.


QBXMLRP2Installer - InstallShield Wizard
Ready to Install the Program
The wizard is ready to begin installation.
Click Install to begin the installation.
If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.
InstallShield
< Back
Install
Cancel

4. Click on 'Install;.
5. The installation will begin.

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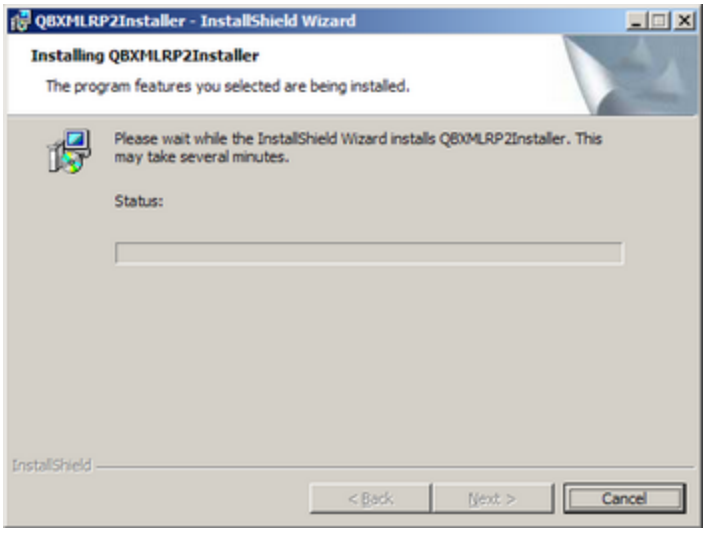
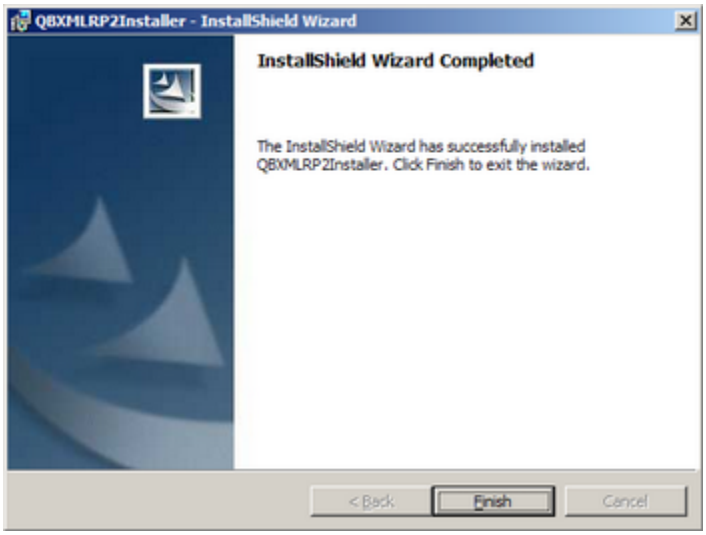
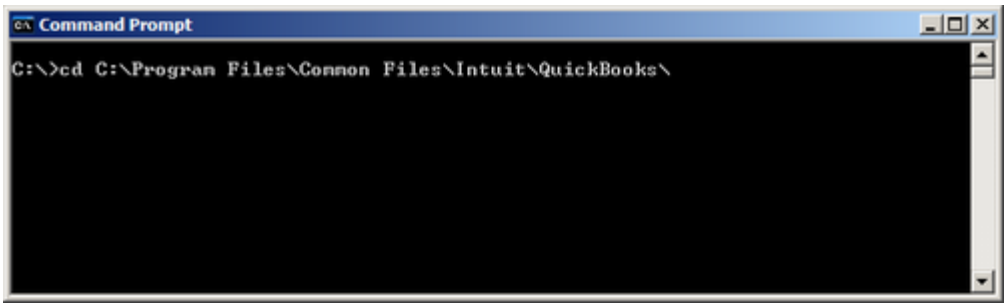

QBXMLRP2Installer - InstallShield Wizard
Installing QBXMLRP2Installer
The program features you selected are being installed.
Please wait while the InstallShield Wizard installs QBXMLRP2Installer. This may take several minutes.
Status:
InstallShield
< Back
Next >
Cancel

6. When the application is finished installing, the following window will appear and now you must click on the 'Finish' button to complete the installation.


QBXMLRP2Installer - InstallShield Wizard
InstallShield Wizard Completed
The InstallShield Wizard has successfully installed QBXMLRP2Installer. Click Finish to exit the wizard.
< Back
Finish
Cancel

7. Next copy qbXMLRP2e.exe to C:\Program Files\Common Files\Intuit\Quickbooks\.
8. Open QuickBooks.
9. Click Start, Programs, Accessories, Command Prompt.
10. Type this line at the prompt - cd C:\Program Files\Common Files\Intuit\QuickBooks\



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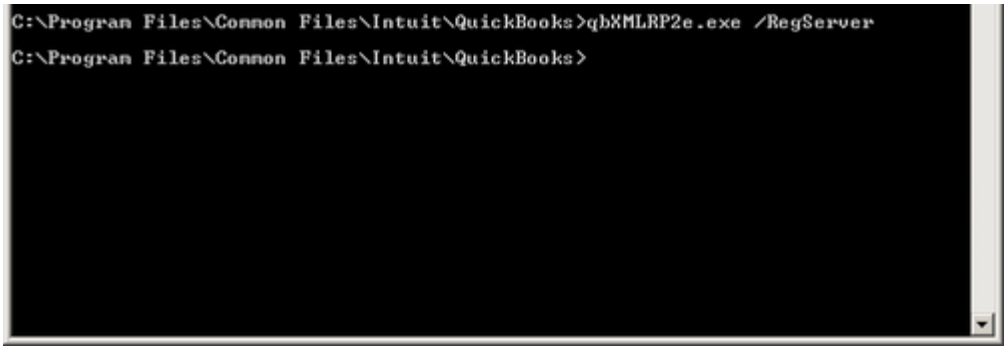
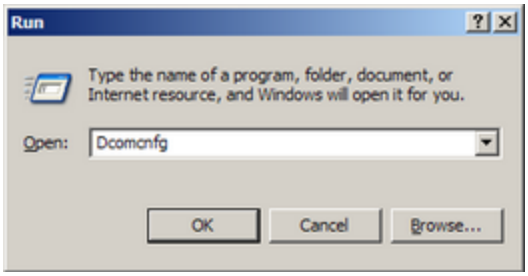
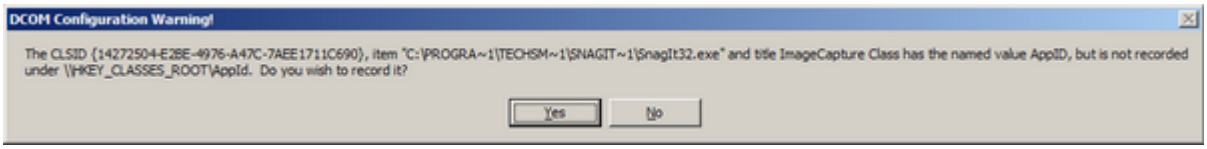
11. Hit enter.
12. Type this on the next blank line - qbXMLRP2e.exe /RegServer and hit enter. After the DLL installs, you will receive a blank line with no messages.



13. Next Launch DCOMCNFG by clicking the Start button, selecting Run and typing "Dcomcnfg" in the Run dialog box.



14. Click on Component Services, Computers, My Computer, DCOM Config. You may receive the following DCOM warnings, just click NO to all. In the list make sure you see qbXMLRP2e.


DCOM Configuration Warning!
The CLSID {14272504-E2BE-4976-A47C-7AEE1711C690}, item "C:\PROGRA~1\TECHSM~1\SNAGIT~1\SnagIt32.exe" and title ImageCapture Class has the named value AppID, but is not recorded under \\HKEY_CLASSES_ROOT\AppId. Do you wish to record it?
Yes
No

15. Now open up Internet Explorer and go to Tools, Internet, Options, Security. Choose Custom Level and then find the heading 'Download Unsigned ActiveX Controls'. Change the setting for this line to 'Prompt'. Click on 'Ok' to save this setting.
16. Login to your eDirectGlass account. Remember, QuickBooks ***must*** be open anytime that the user wants to synchronize or work with eDirectGlass and QuickBooks.
17. Click on Administration then click on QuickBooks Setup *button to get to the QuickBooks Setup Screen.*

Enter your QuickBooks company filename then press the Chart of Accounts button.
Browse...
Your current selection is:
Chart of Accounts
Back
Using this app will reset accounting security for all store users!

QuickBooks Setup Screen

18. Click on the Browse... *button to bring up the choose file window. Select your QuickBooks file*

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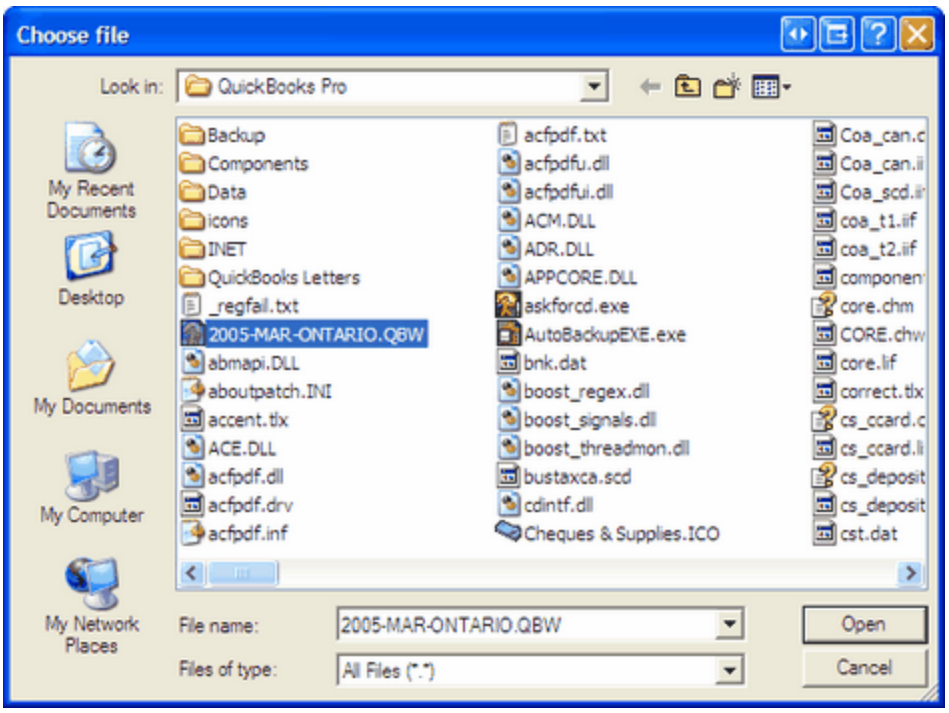
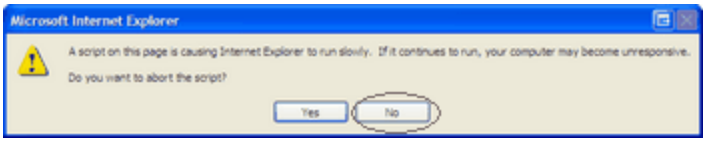
(usually located C:\Program Files\Intuit\QuickBooks Pro and will have an extension of .QBW). Once you have located the file, click on the Open button to use the selected QuickBooks file.



19. *Once you have selected your file, click on the* Chart of Accounts button. You will get an Internet Explorer ActiveX warning box, simply click on Yes. If you get a box asking if you want to abort the script, click NO.

Internet Explorer
An ActiveX control on this page might be unsafe to interact with other parts of the page. Do you want to allow this interaction?
Yes
No


Microsoft Internet Explorer
A script on this page is causing Internet Explorer to run slowly. If it continues to run, your computer may become unresponsive.
Do you want to abort the script?
Yes
No

20. eDirectGlass will talk to your local installation of QuickBooks and pop-up the following dialog box:

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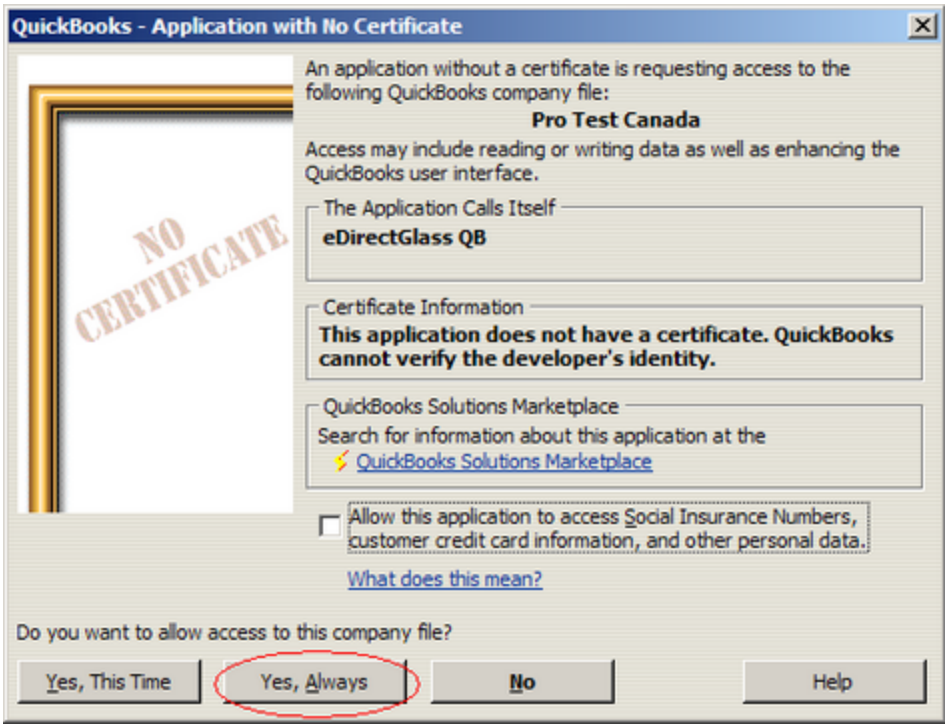
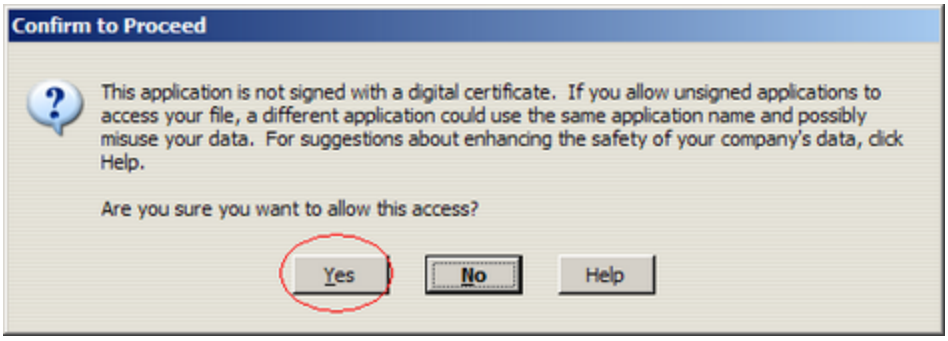

QuickBooks - Application with No Certificate
NO CERTIFICATE
An application without a certificate is requesting access to the following QuickBooks company file:
Pro Test Canada
Access may include reading or writing data as well as enhancing the QuickBooks user interface.
The Application Calls Itself
eDirectGlass QB
Certificate Information
This application does not have a certificate. QuickBooks cannot verify the developer's identity.
QuickBooks Solutions Marketplace
Search for information about this application at the
QuickBooks Solutions Marketplace
Allow this application to access Social Insurance Numbers, customer credit card information, and other personal data.
What does this mean?
Do you want to allow access to this company file?
Yes, This Time
Yes, Always
No
Help

21. Select "Yes, Always" to allow your eDirectGlass account access to your QuickBooks account.


Confirm to Proceed
This application is not signed with a digital certificate. If you allow unsigned applications to access your file, a different application could use the same application name and possibly misuse your data. For suggestions about enhancing the safety of your company's data, click Help.
Are you sure you want to allow this access?
Yes
No
Help

22. Select 'Yes' on the Confirm to Proceed window.

23. Back in eDirectGlass you will see the Chart of Accounts mapping screen. You may get a warning message from Internet Explorer regarding the speed of waiting for the Chart of Accounts. If you do, click 'No'; otherwise, you may cause a setup issue.

24. Verify the Revenue & COGS GL accounts for all Part ID's and Categories. The system pre-populates most of these accounts, but if there is an account that doesn't match with your GL, it will leave it blank and you must make a selection. Making a selection from the drop down boxes automatically saves the selections.

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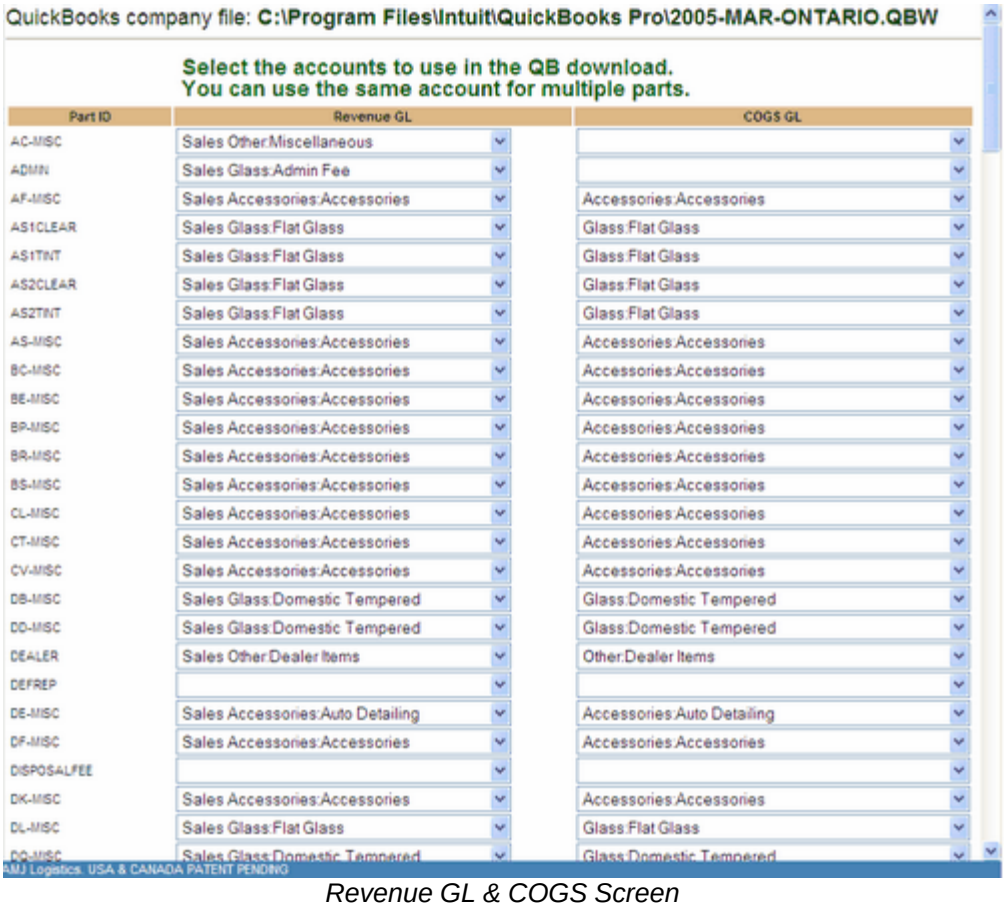
QuickBooks company file: C:\Program Files\Intuit\QuickBooks Pro\2005-MAR-ONTARIO.QBW
Select the accounts to use in the QB download.
You can use the same account for multiple parts.
Part ID
Revenue GL
COGS GL
AC-MISC Sales Other:Miscellaneous
ADMIN Sales Glass:Admin Fee
AF-MISC Sales Accessories:Accessories Accessories:Accessories
AS1CLEAR Sales Glass:Flat Glass Glass:Flat Glass
AS1TINT Sales Glass:Flat Glass Glass:Flat Glass
AS2CLEAR Sales Glass:Flat Glass Glass:Flat Glass
AS2TINT Sales Glass:Flat Glass Glass:Flat Glass
AS-MISC Sales Accessories:Accessories Accessories:Accessories
BC-MISC Sales Accessories:Accessories Accessories:Accessories
BE-MISC Sales Accessories:Accessories Accessories:Accessories
BP-MISC Sales Accessories:Accessories Accessories:Accessories
BR-MISC Sales Accessories:Accessories Accessories:Accessories
BS-MISC Sales Accessories:Accessories Accessories:Accessories
CL-MISC Sales Accessories:Accessories Accessories:Accessories
CT-MISC Sales Accessories:Accessories Accessories:Accessories
CV-MISC Sales Accessories:Accessories Accessories:Accessories
DB-MISC Sales Glass:Domestic Tempered Glass:Domestic Tempered
DD-MISC Sales Glass:Domestic Tempered Glass:Domestic Tempered
DEALER Sales Other:Dealer Items Other:Dealer Items
DEFREP
DE-MISC Sales Accessories:Auto Detailing Accessories:Auto Detailing
DF-MISC Sales Accessories:Accessories Accessories:Accessories
DISPOSALFEE
DK-MISC Sales Accessories:Accessories Accessories:Accessories
DL-MISC Sales Glass:Flat Glass Glass:Flat Glass
DO-MISC Sales Glass:Domestic Tempered Glass:Domestic Tempered
AMJ Logistics, USA & CANADA PATENT PENDING

Revenue GL & COGS Screen

25. Next, you must go in to QuickBooks, with your company file open and make the following changes:

    a. Go to Edit, Preferences and find the Purchases & Vendor icon. Click on this icon.

    b. Next click on the Company Preferences tab. Make sure that the 'Inventory and purchase orders are active' check box is active. Close the Preferences window when you are finished.

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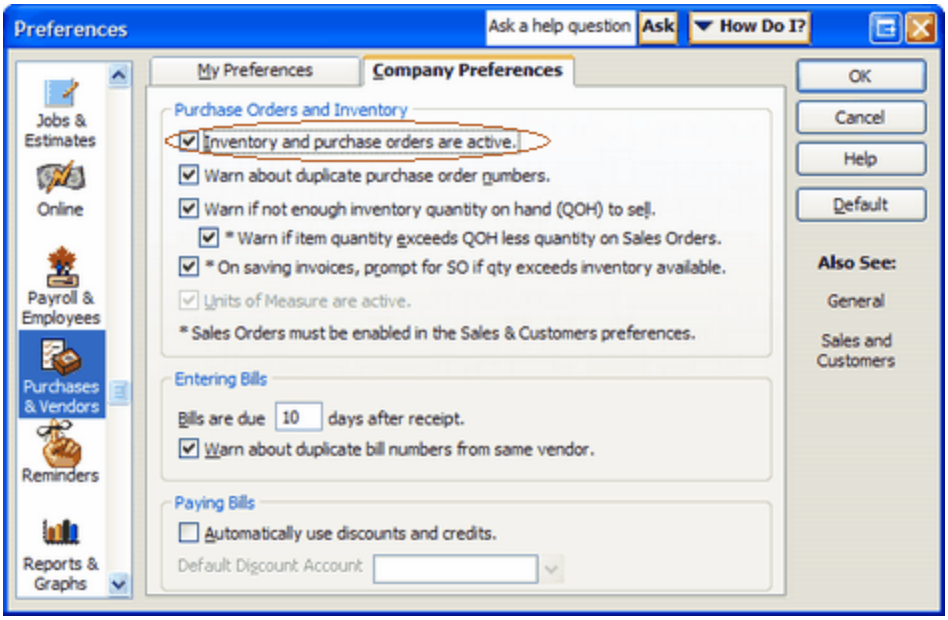

Preferences
Ask a help question
Ask
How Do I?
My Preferences
Company Preferences
OK
Cancel
Help
Default
Also See:
General
Sales and Customers
Jobs & Estimates
Online
Payroll & Employees
Purchases & Vendors
Reminders
Reports & Graphs
Purchase Orders and Inventory
Inventory and purchase orders are active.
Warn about duplicate purchase order numbers.
Warn if not enough inventory quantity on hand (QOH) to sell.
* Warn if item quantity exceeds QOH less quantity on Sales Orders.
* On saving invoices, prompt for SO if qty exceeds inventory available.
Units of Measure are active.
* Sales Orders must be enabled in the Sales & Customers preferences.
Entering Bills
Bills are due 10 days after receipt.
Warn about duplicate bill numbers from same vendor.
Paying Bills
Automatically use discounts and credits.
Default Discount Account

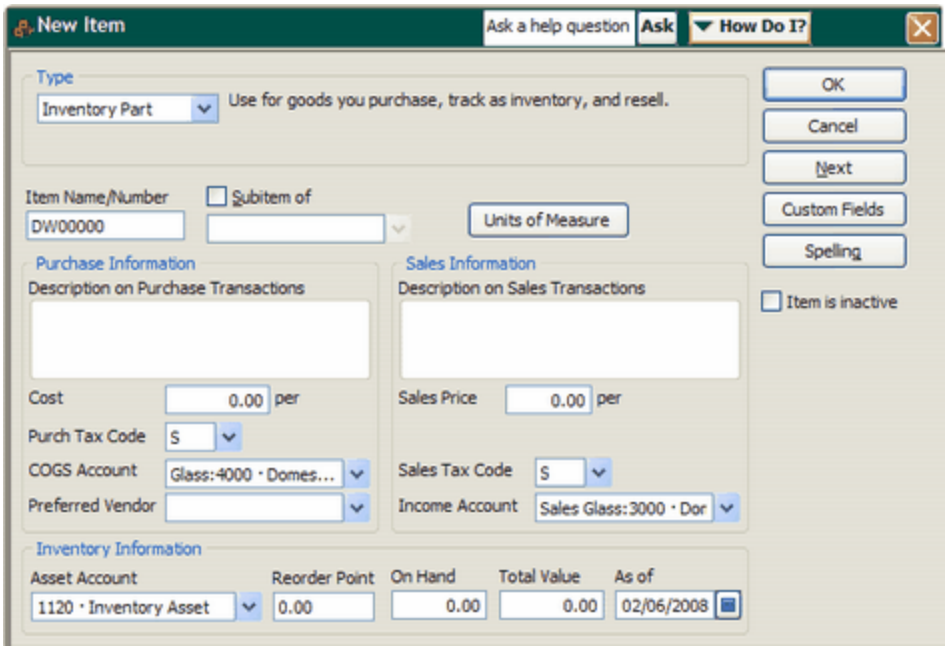
QuickBooks - Preferences

26. Now, click on the Item button on the main menu.

27. Click on the Item button at the bottom of the screen and choose New.

28. Choose 'Inventory Part' as the Type. Enter DW00000 in the Item Name/Number box.

29. In the 'Income Account' box, choose 'Sales Glass' and in the 'Asset Account' box choose 'Inventory Asset'. **Note: The 'Inventory Asset' account must NOT be a sub-account and must be named 'Inventory Asset' exactly.** Click on the OK button to save.



QuickBooks - New Item Screen

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30. Now, click on Lists, then click on Tax Codes List.

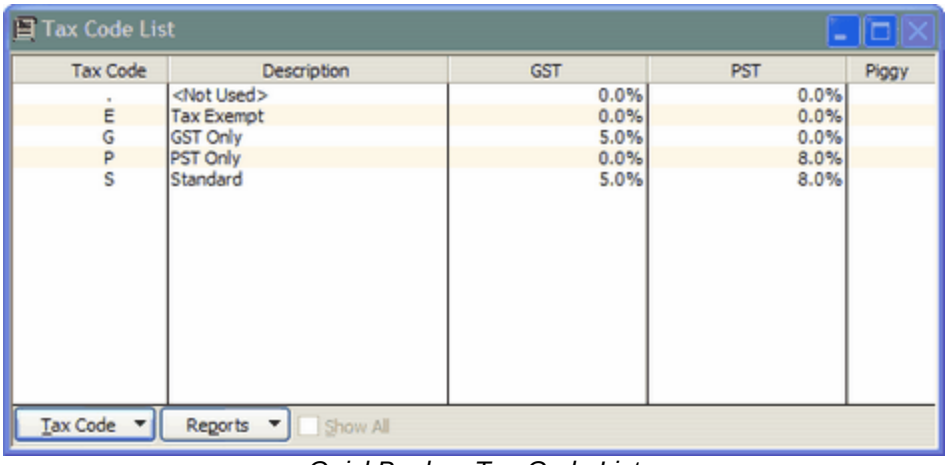
31. Make sure you have **all** of the following in your list and that all of the tax rates are current:

    S - Standard (default) which should include GST & PST
    (or HST total tax rate only in the GST field*)
    (and if in PEI, make sure the piggyback check box is checked)

    E - Exempt (no taxes)

    G - GST only

    P - PST only



QuickBooks - Tax Code List

*** If you are in a Province where you use HST**, you must make sure to modify your standard tax code 'S' to show 14% under the GST listing. To change this, right mouse click on the Standard line in the list and choose 'Edit'. In the GST tax rate box, change the number to 13% and then click on the OK button.

32. Next click on 'Lists' and select 'Chart of Accounts'.

33. In the Chart of Accounts, make sure that Inventory Asset is not a sub-account. If it is, create a new Inventory Asset account.

34. Next click on Lists, Customer & Vendor Profile Lists, Payment Method List to display your list of Payment Methods.

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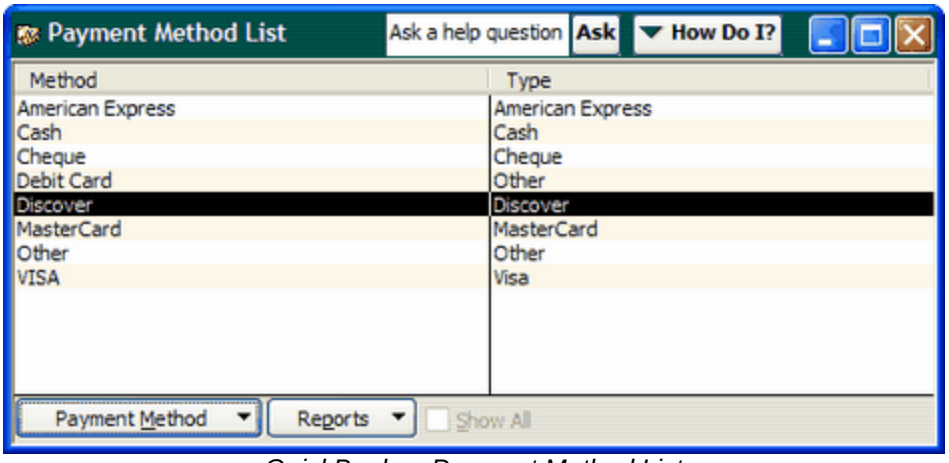


QuickBooks - Payment Method List

35. Please ensure that you have ALL of the following Payment Methods listed exactly as shown here:

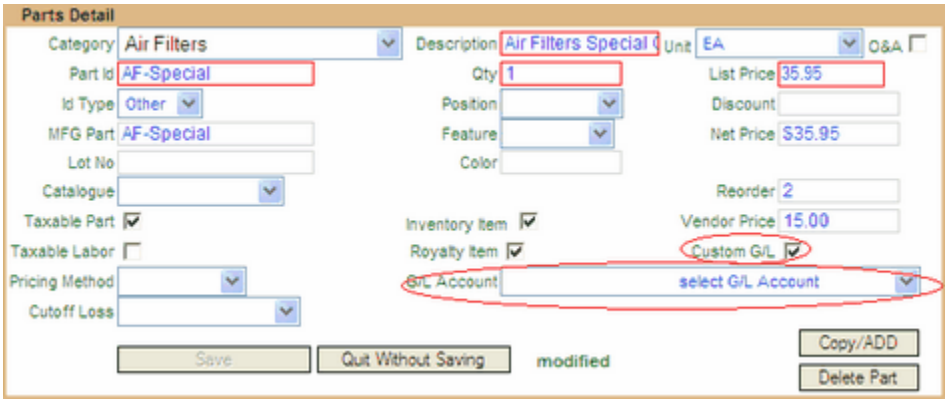
    American Express
    Cash
    Cheque
    Debit Card
    Discover
    MasterCard
    Other
    VISA

Note: If you are missing one of these payment methods, you will not be able to successfully export your payments to QuickBooks.

2.10.1 Custom GL Account

If you create a new part under Parts Admin, you are able to assign a Custom GL Account for that particular part. For example, you create a new part for a special order Air Filter and you want this part to go to Sales Other: Special Order Parts while all of your other Air Filter parts go to Sales Other: Air Filters. In the Parts Detail screen, you will be able to select a Custom GL Account for this special Air Filter.

1. You can select the Custom GL Account either by updating an existing part record or while you are adding a new part.
2. On the Parts Detail window, check the Custom G/L ☑ box and make your GL Account selection from the drop down list.



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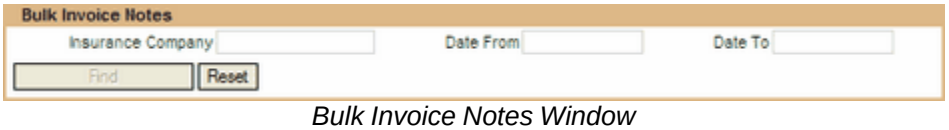
Parts Detail Window

3. Once you have made you selection, click on the Save button to apply the changes.

2.11 Bulk Invoice Notes

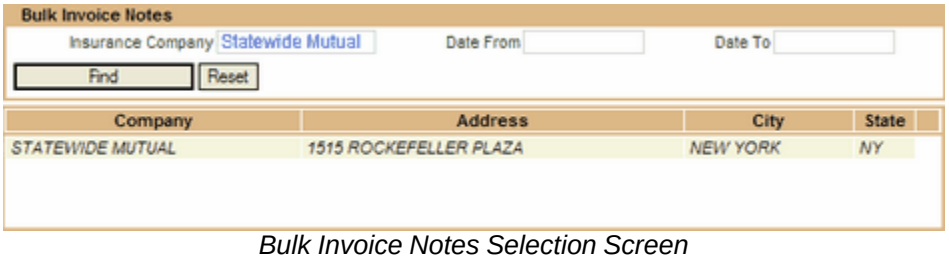
eDirectGlass allows you to add Invoice Notes to a range of invoices at one time.

1. Click on the Administration button on the Menu Bar to display the Administration Sub Menu.
2. Click on the Bulk Invoice Notes button to display the Bulk Invoice Notes window in the Work Area.



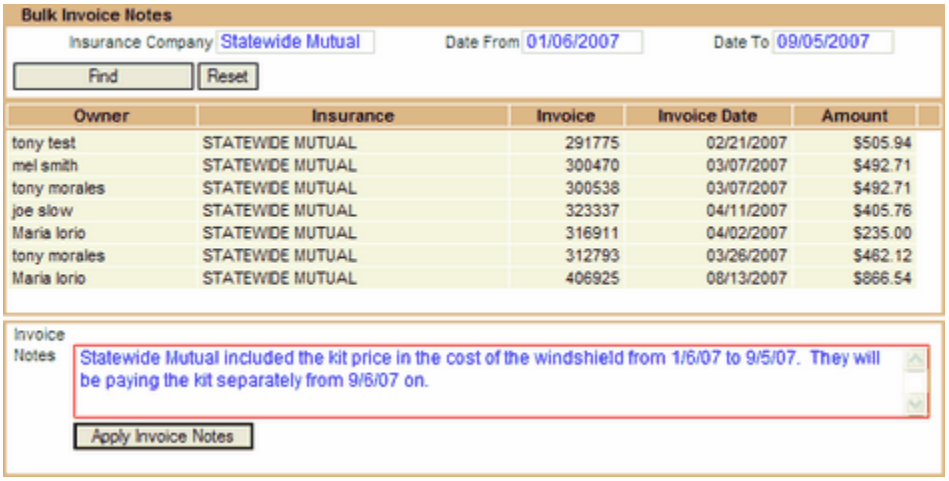
Bulk Invoice Notes Window

3. Enter your search criteria then click on the Find button to list the Insurance Company and/or date range selected.



Bulk Invoice Notes Selection Screen

4. Double click on the Insurance Company to display a list of invoices that will have the notes added to them and to display the Invoice Notes box at the bottom of the list.


Bulk Invoice Notes
Insurance Company Statewide Mutual
Date From 01/06/2007
Date To 09/05/2007
Find
Reset
Owner
Insurance
Invoice
Invoice Date
Amount
tony test STATEWIDE MUTUAL 291775 02/21/2007 $505.94
mel smith STATEWIDE MUTUAL 300470 03/07/2007 $492.71
tony morales STATEWIDE MUTUAL 300538 03/07/2007 $492.71
joe slow STATEWIDE MUTUAL 323337 04/11/2007 $405.76
Maria Iorio STATEWIDE MUTUAL 316911 04/02/2007 $235.00
tony morales STATEWIDE MUTUAL 312793 03/26/2007 $462.12
Maria Iorio STATEWIDE MUTUAL 406925 08/13/2007 $866.54
Invoice Notes
Statewide Mutual included the kit price in the cost of the windshield from 1/6/07 to 9/5/07. They will be paying the kit separately from 9/6/07 on.
Apply Invoice Notes

Bulk Invoice Notes List

5. When you have finished creating your notes, click on the Apply Invoice Notes *button to add the notes to all of the listed invoices.*

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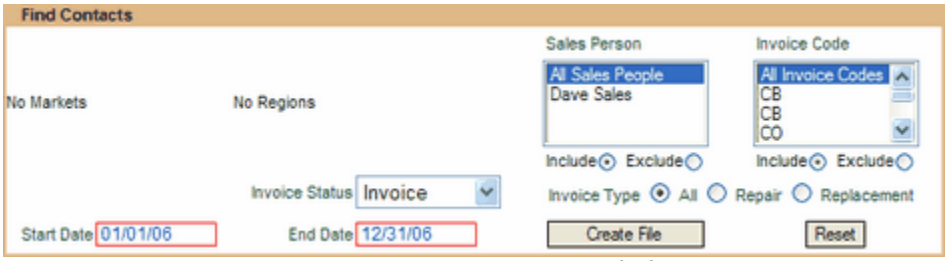
2.12 Contact Export

eDirectGlass allows you to export your contact information for given parameters to an Excel spreadsheet for marketing/administrative purposes.

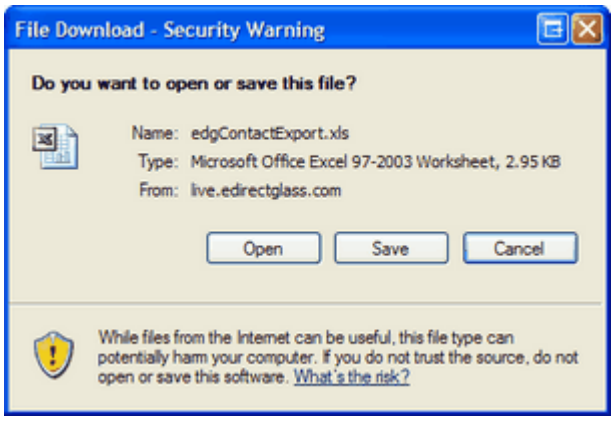
To view and maintain an existing Cash Profile in your eDirectGlass system:

1. Click on the Administration button on the Menu Bar to display the Administration Sub Menu.
2. Click on the Contact Export button to display the Contact Export parameters window in the Work Area.



Contact Export Parameters Window

3. After you have selected your export parameters, click on the Create File button.
4. The system will ask you if you wish to 'Open' or 'Save' the file. Click on the 'Save' button to save the file to your computer.


File Download - Security Warning
Do you want to open or save this file?
Name: edgContactExport.xls
Type: Microsoft Office Excel 97-2003 Worksheet, 2.95 KB
From: live.edirectglass.com
Open
Save
Cancel
While files from the Internet can be useful, this file type can potentially harm your computer. If you do not trust the source, do not open or save this software. What's the risk?

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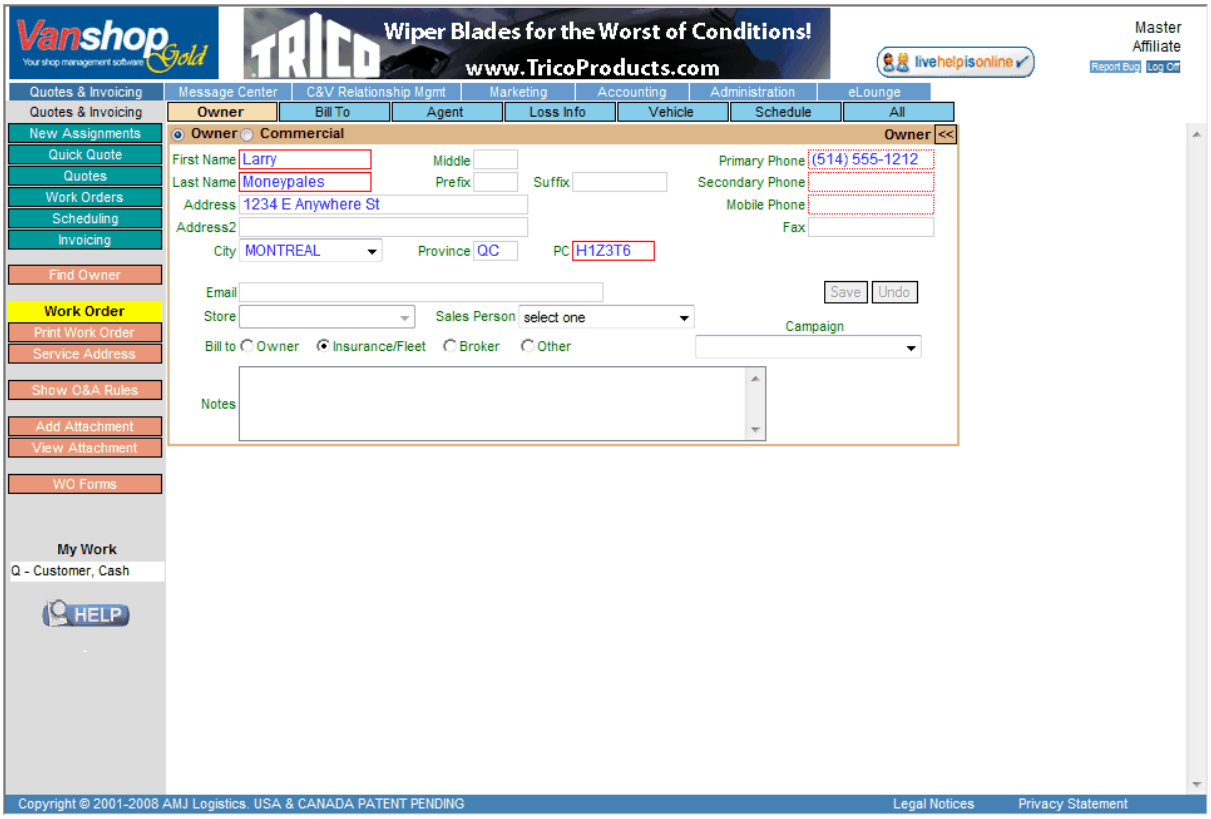
Part 3

3 eDirectGlass Basics

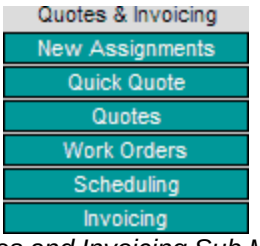
3.1 Overview

This section provides a detailed description of the elements of the eDirectGlass window. Each of the different areas of the window are clearly labeled and defined to help you later in the manual.

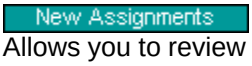


3.1.1 Quotes & Invoicing

Most of your time will be spent in the Quotes & Invoicing area of eDirectGlass. The Sub Menu is made up of 6 buttons, each with a specific task related to the process.



Quotes and Invoicing Sub Menu



Allows you to review new assignments that have been delivered to your account from Networks, Insurance companies and TPAs.

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Quick Quote
Allows you to lookup any vehicle and its glass components for review or instant quoting.

Quotes
Allows you to enter new quotes or manage existing quotes.

Work Orders
Allows you to manage and schedule quotes that have been converted to Work Orders.

Scheduling
Allows you to manage your shop and technicians' production schedule.

Invoicing
Allows you to create new invoices or manage repair orders that have been converted to an invoice. Also contains the functionality to submit work to your business partners electronically or manually.

3.1.2 Message Center

The Message Center allows you to communicate directly the details of a claim with your business partners. This feature is similar to 'Instant Messaging'; however, it is secure and can only be initiated with a claim.

Message Center Sub Menu

Check Messages
Allows you to check for 'New' messages.

Create Message
Allows you to create a 'New' message.

Inbox
Allows you to see all messages that have been sent to your account.

Outbox
Allows you to see pending messages, such as saved, unsent messages.

Sent Items
Allows you to see all messages that you have sent from your account.

Trash
Allows you to manage your Message Center trash folder, similar to the 'Recycle' bin.

3.1.3 C & V Relationship Mgmt

The Customer and Vendor Relationship Management feature allows you to manage all of your customer and business partner information. This feature allows you to store information on your contacts and manage your relationships with each one.

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C & V Sub Menu

Owner Contact
Manage your Owner contact records.

Insurance Contact
Manage your Insurance, Broker & Commercial contacts and create/maintain your private O&A profiles.

Agent Contact
Manage your Agent contacts (e.g., Car Wash employees that send you referrals).

Other Contact
Allows you to create and manage other contacts such as those that provide services to you.

3.1.4 Marketing

The Marketing feature allows your organization to measure all of its marketing efforts as they relate to the work you do. Simply input the type of campaign(s) that your company is engaged in and be sure to select the applicable campaign when creating a new quote.

Marketing Sub Menu

Owner Marketing
Allows you to create and manage marketing efforts as they relate to Owners (walk-in, cash glass, etc.)

Agent Marketing
Allows you to measure your efforts in marketing and working with Agents who refer business to you.

Fleet/Ins Marketing
Allows you to measure your efforts with your Fleet, Insurance and TPA customers.

Marketing Reports
Contains all of the reports for each of the Marketing modules.

3.1.5 Accounting

The Accounting feature included with eDirectGlass is a basic accounts receivable application. You can use this feature to manage your accounts receivable to reduce the burden of a full or part-time accounting person. This is also where you will manage your Vanfax orders.

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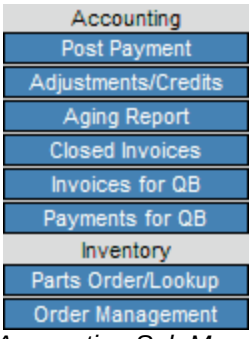

Accounting Sub Menu

Post Payment

Allows you to post payments against invoices or repair orders in the system.

Adjustments/Credits

Allows you to adjust, write-off or credit amounts against invoices in the system.

Aging Report

Allows you to create an AR aging report for any customer in the system with open or outstanding invoices or repair orders.

Closed Invoices

Allows you to view a list of all of the invoices in your system that have a zero balance.

Invoices for QB

Allows you to select the invoices you wish to send down to your QuickBooks file.

Payments for QB

Allows you to select the payments, adjustments and credit memos to send down to your QuickBooks file.

Parts Order/Lookup

Allows you to lookup and order parts independent of a specific Work Order.

Order Management

Allows you to check the status and receive parts on your orders sent to Vanfax.

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Part 4

4 Quotes & Invoicing

This chapter provides instructions for working with new assignments, quotes, repair orders and invoices. In addition, this chapter also covers production scheduling and advanced usage techniques.

In each of the Sub Menu features in this module, the following Task Menu will appear when working with a claim:

Quoting & Invoicing Task Menu

Owner
Displays all of the Owner information both commercial and insured owned.

Bill To
Displays the Bill To information, if any, for the claim. This can include Insurance, Broker, Fleet or Commercial information.

Agent
Displays user selected Broker information. Otherwise, you may use it in conjunction with the Agent Contact records in the C&V Relationship Management module to track your referrals.

Loss Info
Displays the Loss information with regards to the claim.

Vehicle
Displays the Vehicle information including the parts and pricing information for both the Owner and Insurance/Broker/Fleet.

Schedule
Displays the Schedule information for the claim.

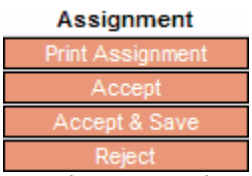
All
Displays all of the previous Task Menu items in one screen view that is collapsible.

4.1 New Assignments

The New Assignments feature is where you will find any assignments that have been sent to your company electronically through the eDirectGlass system. Here you can choose to review, accept or reject any of these assignments.

New Assignment Sub Menu

When you select or are reviewing an assignment, the following Sub Menu will become active in the Sub Menu area:



New Assignment Sub Menu

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Print Assignment
Allows you to print all of the Assignment information.

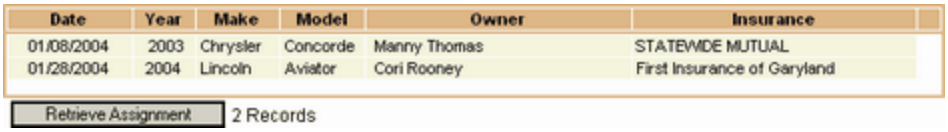
Accept
Allows you to accept the assignment and immediately convert it to a Repair Order to make changes to the record.

Accept & Save
Allows you to accept the assignment and convert it to a Repair Order for later completion.

Reject
Allows you to reject an assignment. A message box will display where you must enter a reason for rejecting the assignment. This information will not be sent back to the issuing party.

4.1.1 Review Assignments

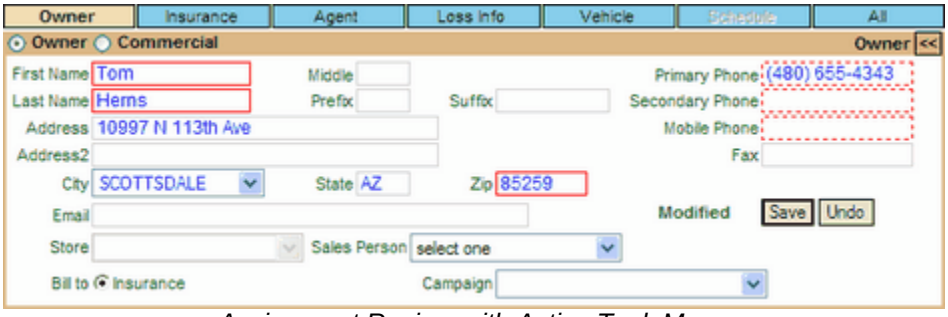
After selecting the New Assignments button, a list of assignments both new and previously read (however, if the assignment has been accepted, it will no longer be listed here, but under Repair Orders) are displayed in the Work Area.



New Assignments List Window

You can open any one of the assignments in the list by simply double-clicking on an assignment line or single-clicking to highlight the line and then click on the Retrieve Assignment button.

Reviewing Assignment
After the assignment is opened, you will see the assignment information in the Work Area and the Task Menu will become active.



Assignment Review with Active Task Menu

Clicking on each one of the Task Menu items will display the information as it pertains to each menu item. This feature allows you to review the assignment information before making a decision to either accept or reject the assignment.

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4.1.2 Accept Assignment

When you are ready to accept an assignment, you have two choices: Accept or Accept & Save.

Accept

When you click on the Accept button, the Assignment will immediately be converted to a Repair Order and you will be taken directly into the Repair Order work area where you can build a parts list from OEM or NAGS listed parts.

Accept & Save

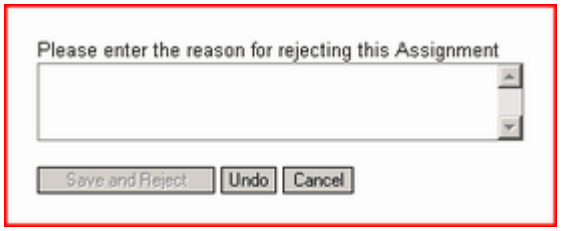
When you click on the Accept & Save button, the Assignment will be saved as a Repair Order where you can work on it at a later time from the Repair Order feature.

4.1.3 Reject Assignment

If for some reason you do not want the Assignment, you can click on the Reject button.

After you click the button, the Reject Reason alert box will appear. You must enter a reason as to why you are rejecting the Assignment. After you have entered a reason, click on the Save and Reject button and the claim will be rejected.

If you DO NOT want to reject the assignment, simply click on the Cancel button.



Reject Reason Alert Box

NOTE: This information will not be sent back to the issuing party, this is information will only be saved in the eDirectGlass database. You will need to contact the issuing party (TPA, Insurance Company, etc.) to reject this job with them.

4.1.4 Show O&A Rules

While you are reviewing the Assignment record, if you want to see what Offer and Acceptance rules apply to the Assignment, you can click on the Show O&A Rules button and the O&A Parameters, if any, will display in the Work Area. When you are finished reviewing the rules, click on Close button.

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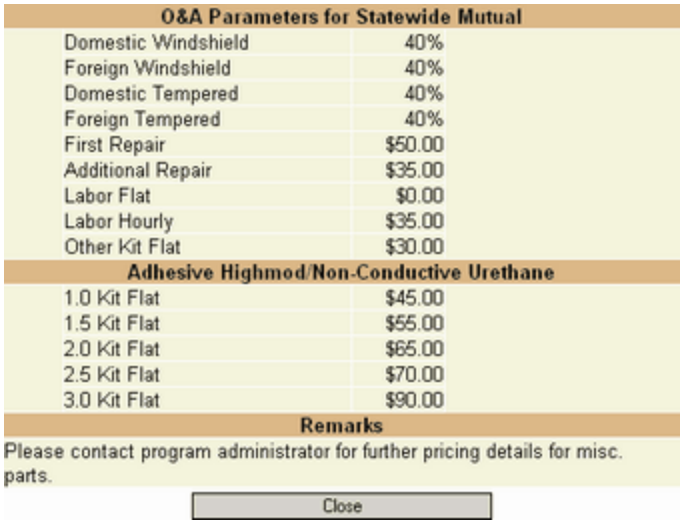
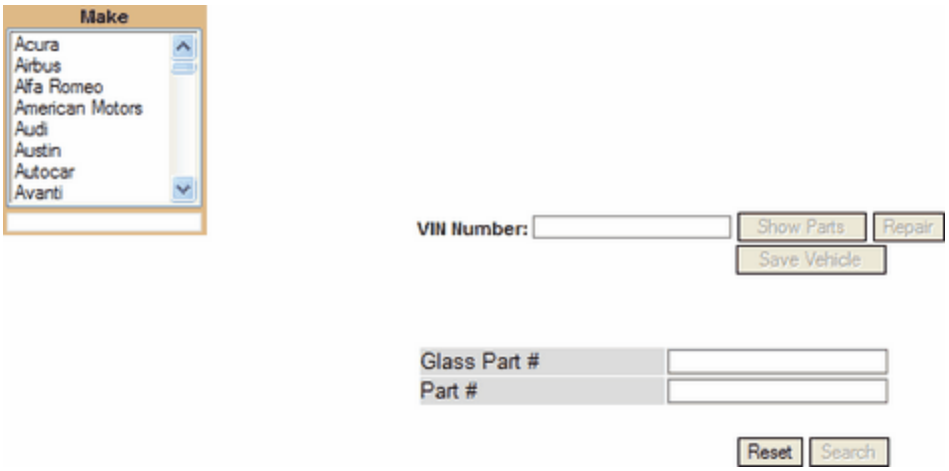


O&A Parameters Screen

4.2 Quick Quote

The Quick Quote feature allows you to quickly review vehicle parts graphics and parts pricing. When you click on the Quick Quote button, the Quick Quote window appears in the Work Area.



Quick Quote Window

If you have a VIN Number, enter it into the VIN Number Box. The system will automatically decode the VIN and build the vehicle. The vehicle may not build out all the way and you may have to select additional vehicle information before the Show Parts button becomes visible. If there is an issue translating the VIN to the vehicle breakdown, the eDirectGlass system will display for you the decoded VIN information and you can simply select the correct corresponding information for the vehicle in question.

If you do not have a VIN Number, you can simply select a Make, Model, Year, Body Style and Submodel instead.

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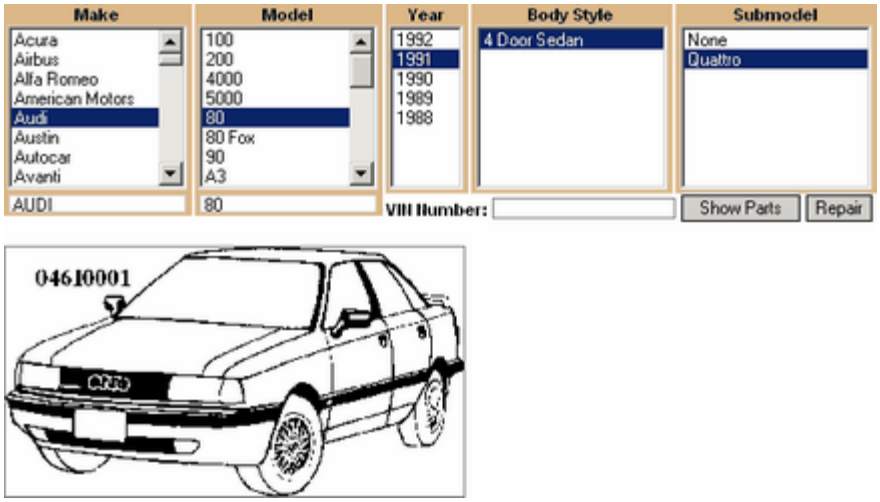
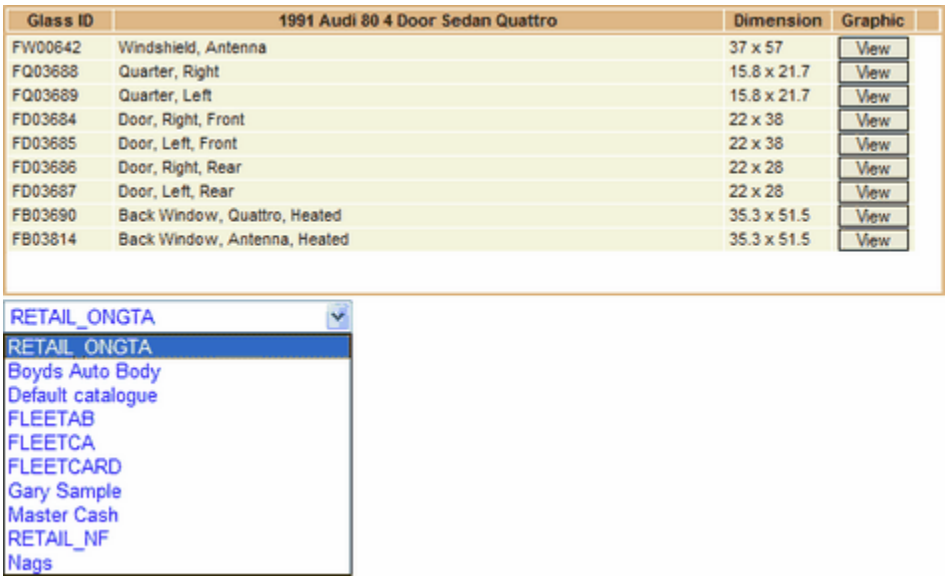


Complete Vehicle Build

When you are ready, you can click on the Show Parts button to work with the graphics and parts pricing. The parts list defaults to your Retail Catalogue. You have the option to select different price lists or catalogues. Simply select it from the drop down before you select the glass part.


Glass ID
1991 Audi 80 4 Door Sedan Quattro
Dimension
Graphic
FW00642 Windshield, Antenna 37 x 57 View
FQ03688 Quarter, Right 15.8 x 21.7 View
FQ03689 Quarter, Left 15.8 x 21.7 View
FD03684 Door, Right, Front 22 x 38 View
FD03685 Door, Left, Front 22 x 38 View
FD03686 Door, Right, Rear 22 x 28 View
FD03687 Door, Left, Rear 22 x 28 View
FB03690 Back Window, Quattro, Heated 35.3 x 51.5 View
FB03814 Back Window, Antenna, Heated 35.3 x 51.5 View
RETAIL_ONGTA
RETAIL_ONGTA
Boyds Auto Body
Default catalogue
FLEETAB
FLEETCA
FLEETCARD
Gary Sample
Master Cash
RETAIL_NF
Nags

You can also look up glass part by the NAGS* part number to see which vehicles use that part. Simply enter the glass part number in the 'Glass Part #' field and click on Search button to view the associated parts.

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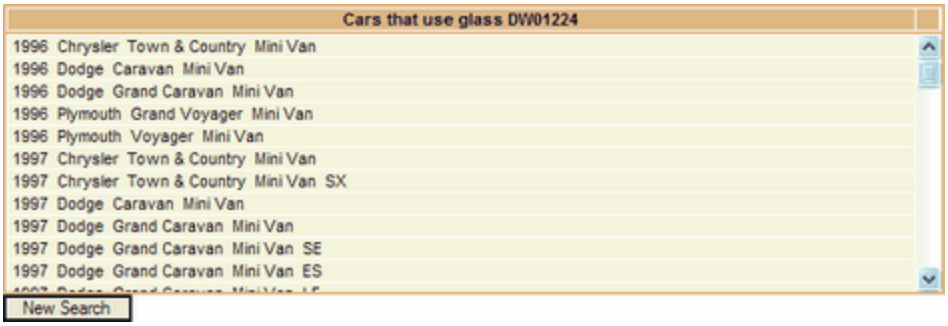
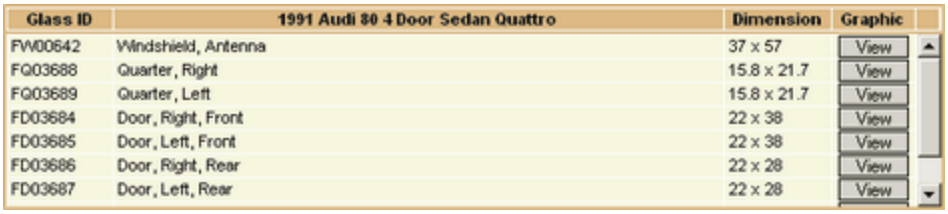

Cars that use glass DW01224
1996 Chrysler Town & Country Mini Van
1996 Dodge Caravan Mini Van
1996 Dodge Grand Caravan Mini Van
1996 Plymouth Grand Voyager Mini Van
1996 Plymouth Voyager Mini Van
1997 Chrysler Town & Country Mini Van
1997 Chrysler Town & Country Mini Van SX
1997 Dodge Caravan Mini Van
1997 Dodge Grand Caravan Mini Van
1997 Dodge Grand Caravan Mini Van SE
1997 Dodge Grand Caravan Mini Van ES
New Search

Glass Part # Associated Vehicles Lookkup

**NAGS is the registered trademark of Mitchell International.*

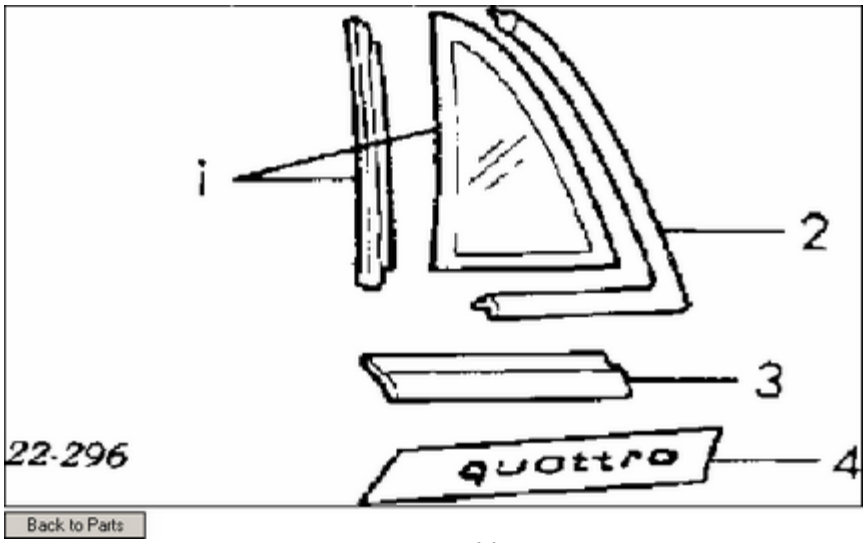
4.2.1 Working with a Quick Quote

After you have clicked on the Show Parts button, the Vehicle Parts window will appear in the Work Area.


Glass ID
1991 Audi 80 4 Door Sedan Quattro
Dimension
Graphic
FW00642 Windshield, Antenna 37 x 57 View
FQ03688 Quarter, Right 15.8 x 21.7 View
FQ03689 Quarter, Left 15.8 x 21.7 View
FD03684 Door, Right, Front 22 x 38 View
FD03685 Door, Left, Front 22 x 38 View
FD03686 Door, Right, Rear 22 x 28 View
FD03687 Door, Left, Rear 22 x 28 View

Initial Vehicle Parts Window

From this display box, you can click on any one of the line items to display the sub menu of components for that specific part. If available, you can also click on the View button to review the part graphic.



Part Graphic

To return to the Vehicle Parts display box, click on the Back to Parts button.

Once you have selected the glass part the price list and associated parts will display in the Work Area.

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Glass ID	2001 Chrysler Town	Dimension	Graphic
DW01224	Windshield	43 x 60	View
DW01410	Windshield, Heated Wiper Park Area, Heated	43 x 60	View
DW01411	Windshield, Heated Wiper Park Area, Heated, Solar Coated	43 x 60	View
DQ09841	Quarter, Right, Power	20.8 x 43.4	View
DQ09842	Quarter, Left, Power	20.8 x 43.4	View
DQ09843	Quarter, Right, Power, Solar Coated	20.8 x 43.4	View
DQ09844	Quarter, Left, Power, Solar Coated	20.8 x 43.4	View
DQ10057	Quarter, Right, Manual	20.8 x 43.4	View
DQ10058	Quarter, Left, Manual	20.8 x 43.4	View
DQ10059	Quarter, Right, Manual, Solar Coated	20.8 x 43.4	View
DQ10060	Quarter, Left, Manual, Solar Coated	20.8 x 43.4	View

O	Part Id	MFG Part	Color	Vendor	Description	Qual	Ref	Qty	Unit	Price
	DW01457	DW01457GBNN	GBN	NAGS	Windshield		1	2.9	hrs	520.94
	DW01224	DW01224GBNN	GBN	NAGS	Windshield		1	2.9	hrs	403.86
	DW01224	5083392AA	GTN	Chrysler-Jeep-Eagle	Windshield		1	2.9	hrs	174.00
	HAH000004	HAH000004		NAGS	Adhesive	2.0 Urethane,Dam,Primer		1	each	32.00
	HAH000448	HAH000448		NAGS	Adhesive	2.0 Fast-Cure Urethane/Dam/Primer		1	each	67.50
	HBB038691	GGW 1628		Gold Glass Group	Blade	Wiper, 28" (set of 2)	0	1	each	14.38
	HFL000132	4716936		Chrysler-Jeep-Eagle	Filler	Strip	3	1	each	19.75
	HFL000132	CXP1226		Creative Extruded	Filler	Strip	3	1	each	8.91
	HFL000132	DK341		Dorcas & Kalam	Filler	Strip	3	1	each	0.00
	HFL000132	DMB 1226-1Z		PerfecTrim	Filler	Strip	3	1	each	9.19
	HFL000132	DRM 1226		Auto Glass Component	Filler	Strip	3	1	each	0.00
	HFL000132	DW-1226BZ		FlexLine Moldings	Filler	Strip	3	1	each	9.32
	HFL000132	GGG 1226		Gold Glass Group	Filler	Strip	3	1	each	8.82
	HFL000132	MW01226 BLZ		OETech	Filler	Strip	3	1	each	9.05
	HFL000132	MW01226O BLZ		OETech	Filler	Strip	3	1	each	0.00
	HFL000132	MWD1226		Creative Extruded	Filler	Strip	3	1	each	8.22
	HFL000132	WFS D1226		Precision	Filler	Strip	3	1	each	8.46
	HMT000026	55076401		Chrysler-Jeep-Eagle	Mount	Mirror	6	1	each	21.45
	HSC000641	4278662		Chrysler-Jeep-Eagle	Spacer	Windshield (set of 2)	2	1	each	1.45

Discount: Convert to Quote Total $0.00

Glass Part/Pricing List

If there is a pricing listed in your Retail Catalogue for the glass part you have selected, it will be highlighted in blue in the price column.

If you have the item in your inventory, your on-hand quantity will be listed in the '**O**' column.

Interchange parts are also listed, but are highlighted in magenta.

4.2.2 Converting a Quick Quote

From the Quick Quote parts sub menu, you can select parts to build a rough price estimate. As you select the parts, by clicking on the empty check box of each required line item, a total will appear at the bottom of the sub menu.

You can also apply a discount to the checked parts, by entering in a percentage in the Discount: box. This discount will only apply to the items selected and will not be applied to labor, which is not a part of the Quick Quote Total.

NOTE: This discount should only be applied to a Quote that *will not* be paid by an Insurance company, Fleet company or TPA.

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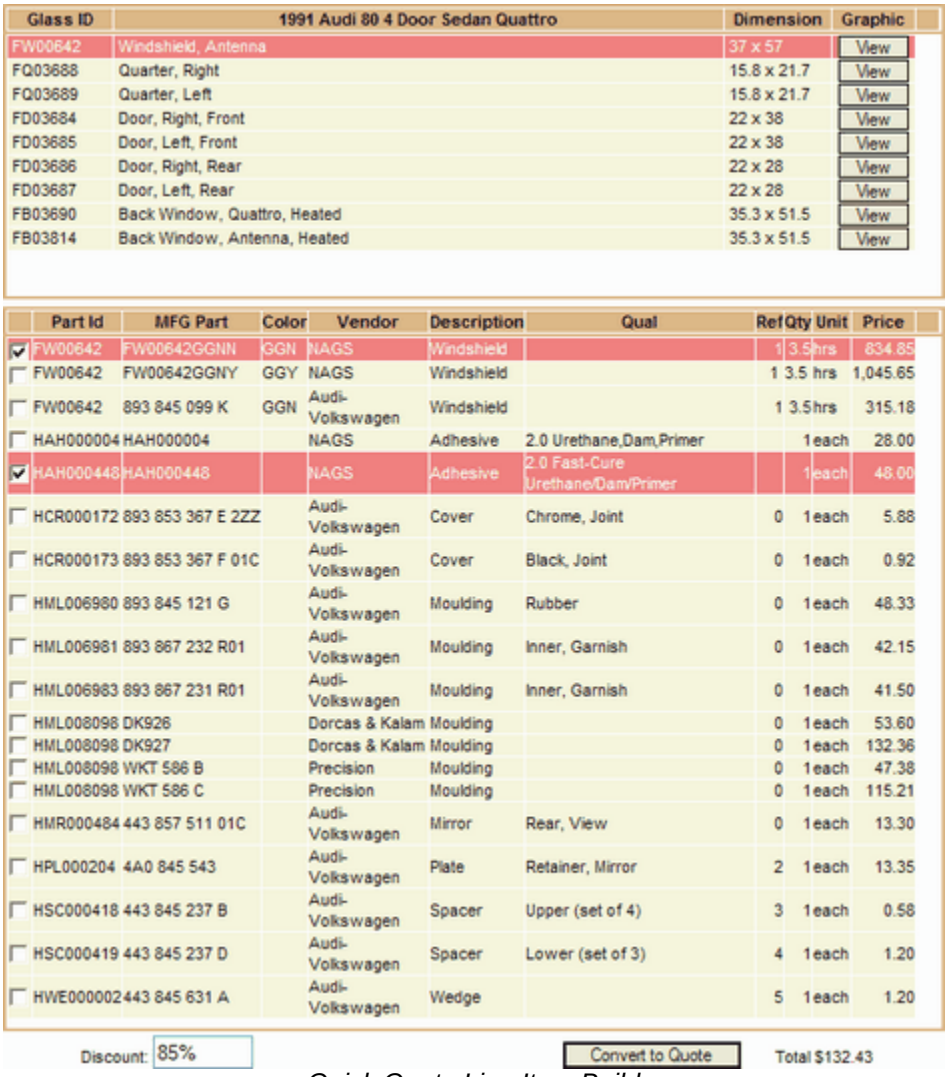
In addition to the total, the Convert to Quote button will appear.

If you wish to convert the Quick Quote to a Quote, simply click the Convert to Quote button and you will be taken to the Quotes feature to complete the process. Any discounts you have entered in the Discount: box will be carried over to the Quote.



Glass ID	1991 Audi 80 4 Door Sedan Quattro	Dimension	Graphic
FW00642	Windshield, Antenna	37 x 57	View
FQ03688	Quarter, Right	15.8 x 21.7	View
FQ03689	Quarter, Left	15.8 x 21.7	View
FD03684	Door, Right, Front	22 x 38	View
FD03685	Door, Left, Front	22 x 38	View
FD03686	Door, Right, Rear	22 x 28	View
FD03687	Door, Left, Rear	22 x 28	View
FB03690	Back Window, Quattro, Heated	35.3 x 51.5	View
FB03814	Back Window, Antenna, Heated	35.3 x 51.5	View

Part Id	MFG Part	Color	Vendor	Description	Qual	Ref	Qty	Unit	Price
FW00642	FW00642GGNN	GGN	NAGS	Windshield		1	3.5	hrs	834.85
FW00642	FW00642GGNY	GGY	NAGS	Windshield		1	3.5	hrs	1,045.65
FW00642	893 845 099 K	GGN	Audi-Volkswagen	Windshield		1	3.5	hrs	315.18
HAH000004	HAH000004		NAGS	Adhesive	2.0 Urethane,Dam,Primer		1	each	28.00
HAH000448	HAH000448		NAGS	Adhesive	2.0 Fast-Cure Urethane/Dam/Primer		1	each	48.00
HCR000172	893 853 367 E 2ZZ		Audi-Volkswagen	Cover	Chrome, Joint	0	1	each	5.88
HCR000173	893 853 367 F 01C		Audi-Volkswagen	Cover	Black, Joint	0	1	each	0.92
HML006980	893 845 121 G		Audi-Volkswagen	Moulding	Rubber	0	1	each	48.33
HML006981	893 867 232 R01		Audi-Volkswagen	Moulding	Inner, Garnish	0	1	each	42.15
HML006983	893 867 231 R01		Audi-Volkswagen	Moulding	Inner, Garnish	0	1	each	41.50
HML008098	DK926		Dorcas & Kalam	Moulding		0	1	each	53.60
HML008098	DK927		Dorcas & Kalam	Moulding		0	1	each	132.36
HML008098	WKT 586 B		Precision	Moulding		0	1	each	47.38
HML008098	WKT 586 C		Precision	Moulding		0	1	each	115.21
HMR000484	443 857 511 01C		Audi-Volkswagen	Mirror	Rear, View	0	1	each	13.30
HPL000204	4A0 845 543		Audi-Volkswagen	Plate	Retainer, Mirror	2	1	each	13.35
HSC000418	443 845 237 B		Audi-Volkswagen	Spacer	Upper (set of 4)	3	1	each	0.58
HSC000419	443 845 237 D		Audi-Volkswagen	Spacer	Lower (set of 3)	4	1	each	1.20
HWE000002	443 845 631 A		Audi-Volkswagen	Wedge		5	1	each	1.20

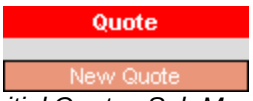
Discount: 85% Convert to Quote Total $132.43

Quick Quote Line Item Build

4.3 Quotes

This eDirectGlass feature allows you to create and manage quotes. In every case, you must create a quote before you can create a Repair Order and Invoice.

When you click the Quotes button, the following Sub Menu will appear:



Initial Quotes Sub Menu

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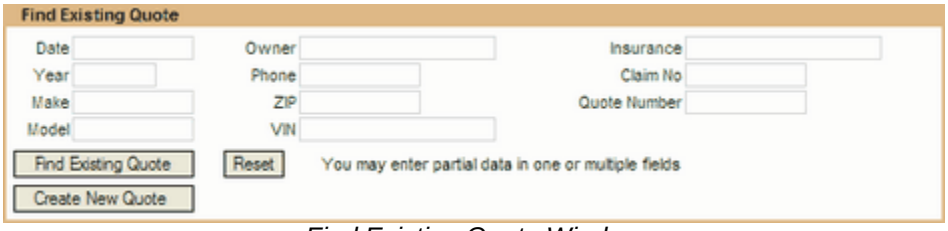
New Quote
The New Quote button will take you to the New Owner Record screen in the Work Area where you can build your quote.

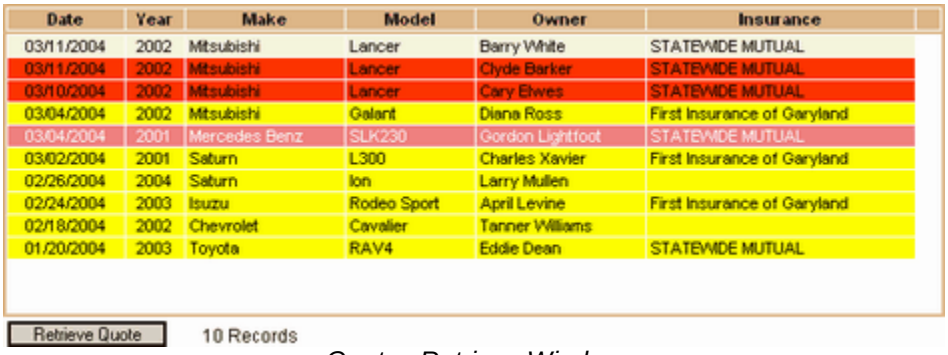
4.3.1 Quote Lookup

When you click on the Quotes button from the Sub Menu, the Find Existing Quote window is displayed in the Work Area.



Find Existing Quote Window

- In this box, you can enter any data, in any combination, to find an existing quote. Once you have entered your search data, simply click on the Find Existing Quote button. If the search finds items that match your search data, those quotes will be displayed in the Work Area.
- If you want to reset your search data for a new search, click on the Reset button.
- If you want to create a new quote, you can click on the Create New Quote button in the Find Existing Quote window or click on the New Quote button in the Sub Menu.
- To retrieve a Quote, simply double-click on a quote line in the Work Area or single-click the line and click on the Retrieve Quote button.


Date Year Make Model Owner Insurance
03/11/2004 2002 Mitsubishi Lancer Barry White STATEWIDE MUTUAL
03/11/2004 2002 Mitsubishi Lancer Clyde Barker STATEWIDE MUTUAL
03/10/2004 2002 Mitsubishi Lancer Cary Elwes STATEWIDE MUTUAL
03/04/2004 2002 Mitsubishi Galant Diana Ross First Insurance of Garyland
03/04/2004 2001 Mercedes Benz SLK230 Gordon Lightfoot STATEWIDE MUTUAL
03/02/2004 2001 Saturn L300 Charles Xavier First Insurance of Garyland
02/26/2004 2004 Saturn Ion Larry Mullen
02/24/2004 2003 Isuzu Rodeo Sport April Levine First Insurance of Garyland
02/18/2004 2002 Chevrolet Cavalier Tanner Williams
01/20/2004 2003 Toyota RAV4 Eddie Dean STATEWIDE MUTUAL
Retrieve Quote
10 Records

Quotes Retrieve Window

4.3.1.1 Quotes List Color Coding

Note: The Quote Retrieve window is color coded for easy identification of items that require attention.

- Red - indicates all Assignments that have been received by your shop from an Insurance Company or TPA/Agent through the eDirectGlass system (came in under the New Assignments module) and are less than 7 days old.

- Yellow - indicates items (Assignments and/or regular quotes) that are older than 7 days.

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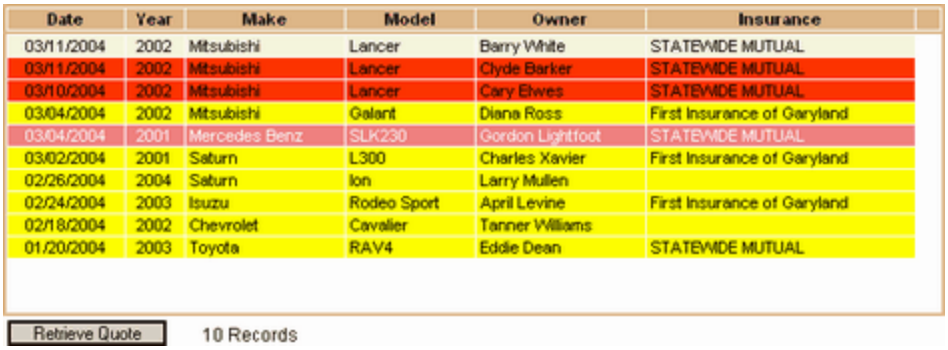
Date
Year
Make
Model
Owner
Insurance
03/11/2004 2002 Mitsubishi Lancer Barry White STATEWIDE MUTUAL
03/11/2004 2002 Mitsubishi Lancer Clyde Barker STATEWIDE MUTUAL
03/10/2004 2002 Mitsubishi Lancer Cary Elwes STATEWIDE MUTUAL
03/04/2004 2002 Mitsubishi Galant Diana Ross First Insurance of Garyland
03/04/2004 2001 Mercedes Benz SLK230 Gordon Lightfoot STATEWIDE MUTUAL
03/02/2004 2001 Saturn L300 Charles Xavier First Insurance of Garyland
02/26/2004 2004 Saturn Ion Larry Mullen
02/24/2004 2003 Isuzu Rodeo Sport April Levine First Insurance of Garyland
02/18/2004 2002 Chevrolet Cavalier Tanner Williams
01/20/2004 2003 Toyota RAV4 Eddie Dean STATEWIDE MUTUAL
Retrieve Quote
10 Records

Quotes List

4.3.2 Create a New Quote

To create a New Quote, click on the Quotes button from the Sub Menu and then click on the New Quote button in the Sub Menu or click on the Create New Quote button in the Find Existing Quote window.

4.3.2.1 Entering Owner Information

The New Owner Record window will display in the Work Area.

New Owner Record Window

1. Choose whether this is an Owner Record or a Commercial Record by selecting the appropriate radio box.
2. Enter all of the contact information. If this is an Owner Record, First and Last names are required, as indicated by the solid red boxes. Commercial Records require the Company Name.
3. You must enter the owner's zip/postal code and then ***tab out*** of this field. The eDirectGlass system will automatically fill in the City and State based on the zip/postal code information.
   Note: The Save button will not be active if the zip/postal code field is not filled out.
4. Enter at least one telephone number, as indicated by the dotted-line red boxes.
5. Select the Sales Person responsible for the job from the Sales Person drop down list, if required.
6. Select the appropriate 'Bill to' information (Owner, Insurance/Fleet, Broker, Other) by selecting the appropriate radio box. If you choose "Other" as the 'Bill to', a second screen will appear in which you must add the appropriate bill to information.

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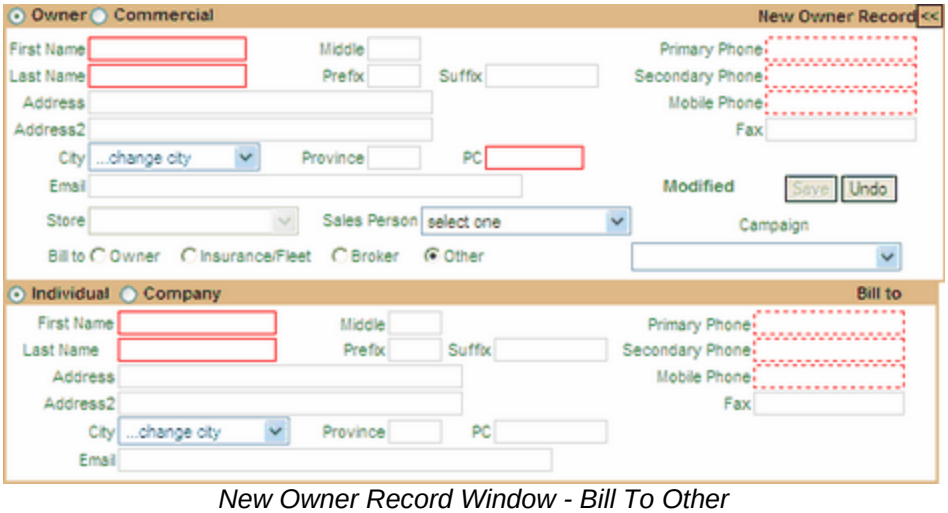
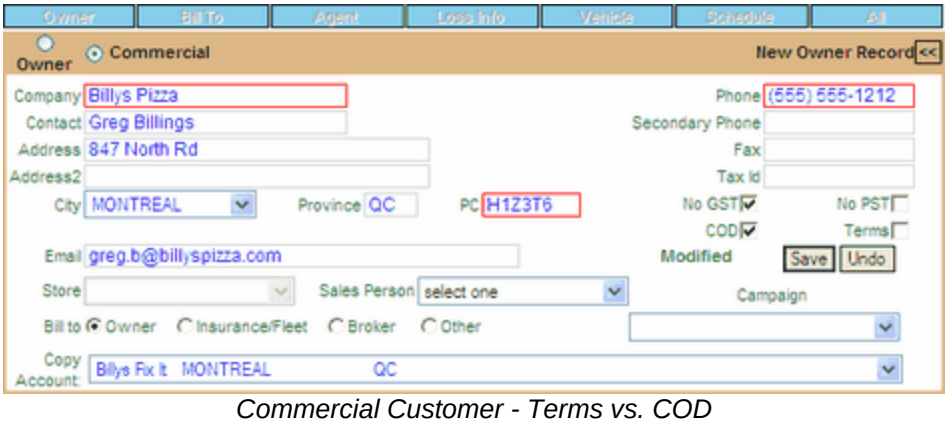


New Owner Record Window - Bill To Other

7. If you have setup any Marketing Campaigns, you can use the drop down box to select the appropriate campaign. (*See the Marketing section of this manual for assistance with this module)*
8. When you are satisfied with the information entered, click on the Save button.
9. If the Bill to selection is Owner or Other, you will be taken directly to the Vehicle tab. If the Bill to selection is Insurance/Fleet or Broker, you will be taken to the Bill To tab.

4.3.2.1.1 Terms or COD for Commercial Customers

If you are billing a Commercial Customer, you must select either Terms or COD. If you select COD, you must enter a full payment in order to be able to submit and print the invoice Selecting Terms will allow you to print and submit the invoice without entering any payments for this customer.



Commercial Customer - Terms vs. COD

4.3.2.1.2 Copy Account

If you are creating a Quote for an existing customer, you can pull up the customer's information and use that to create your new quote.

In the Last Name field (or the Company Name field if the record is a commercial account), type in the first three letters of the last name and at the bottom of the screen the 'Copy Account' drop-down field will appear.

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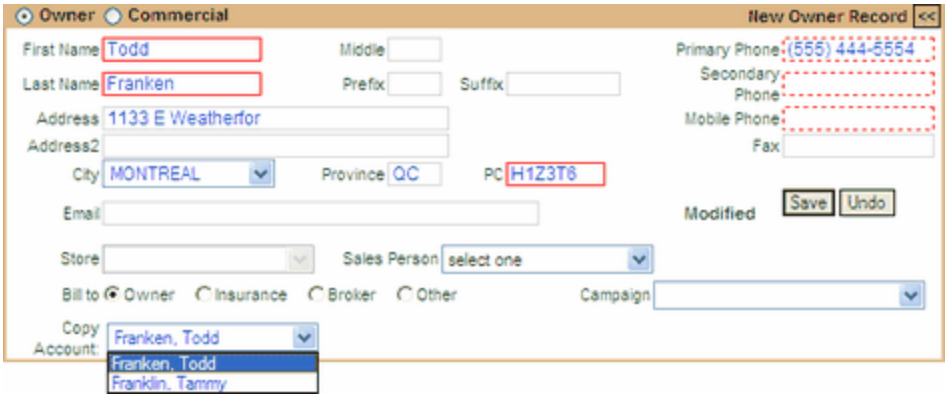
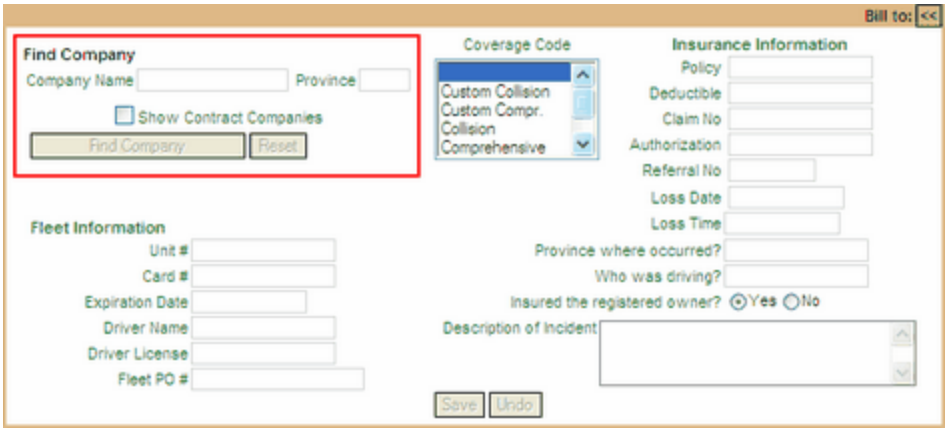


Copy Account Drop-Down

Simply choose the correct customer from the drop-down list and the appropriate fields will be filled in then click on the Save button to continue.

4.3.2.2 Entering Bill To Information

Once the New Owner Record is created, you will be brought to the Bill To window on the Task Menu.



Bill To Task Menu Window

Note: If you selected Bill To of Owner or a Bill To of Other on the Owner tab, the system automatically assigns "No Insurance" to this claim. If this is incorrect, you will need to go back to the Owner tab, select a different Bill To option, click on the Save button, then return to the Bill To tab and follow the instructions under the "Change Bill To" section of this manual.

Quotes and Invoicing Task Bar

1. Start by selecting a Bill To Company. To do this, enter the name of the company (or at least the first three letters of the company's name) or the company's Province in the Find Company box.
2. Click on the Find Company button once you have the Company Name or State information typed in.
3. In the Company Find list, select the correct Company by either double-clicking that line or single-clicking the line to highlight it and then clicking on the Select Insurance button.

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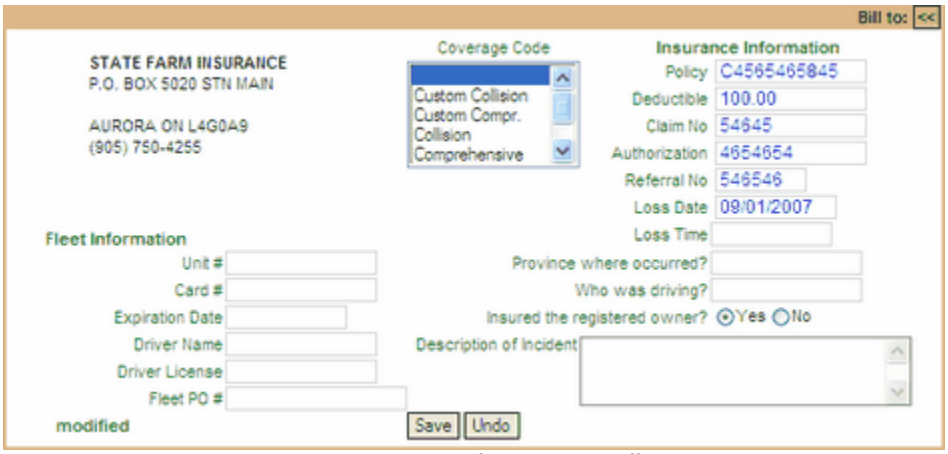
Company Selection List

4. Now complete the company tab record by selecting a Coverage Code, Policy Number, Deductible, Claim No, Authorization, Referral No and Loss Date. Don't worry, if you don't have all or any of this information, you can always enter it later. If you do enter information, make sure to click on the Save button. The system will move you to the next Task Menu tab.

   NOTE: If this is a fleet job, you may fill out the appropriate Fleet Information on this screen.

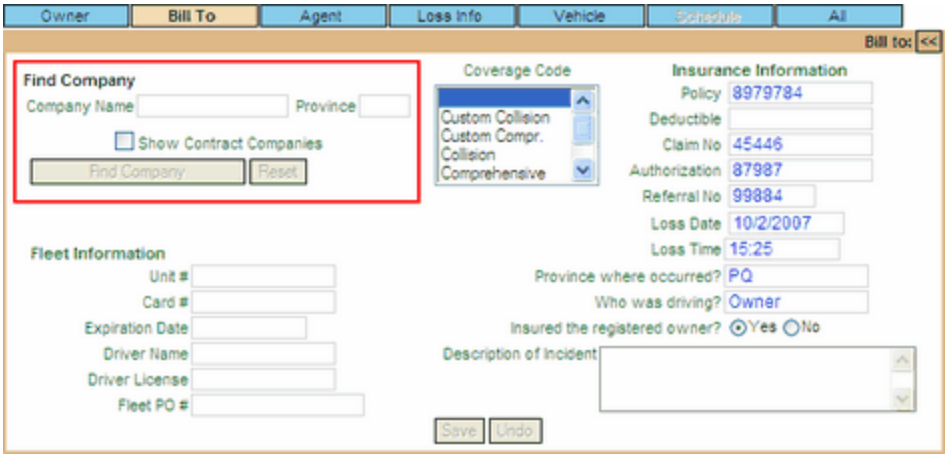
5. If you did not enter any information, select the next tab you wish to work on from the Task Menu.



Company Task Menu Detail

4.3.2.2.1 Change Bill To

If for some reason you need to change the insurance company that was originally selected, click on the Change Insurance button in the Quotes Sub Menu to display the Find Company look up again. Make your new selection and click on the Save button.



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Bill To Company Task Menu Window - Change Company

NOTE: You can change the Company information at any point in the process (Quoting, WO and Invoicing) as long as the invoice has not been submitted. If you do change the Bill To information, you will have to re-enter all of the parts information to ensure proper pricing. If the assignment has come directly to your eDirectGlass system as an Assignment, you will not have the option to make changes to the Company associated with the claim. You are, however, able to update/change the policy information at anytime before submission of the invoice.

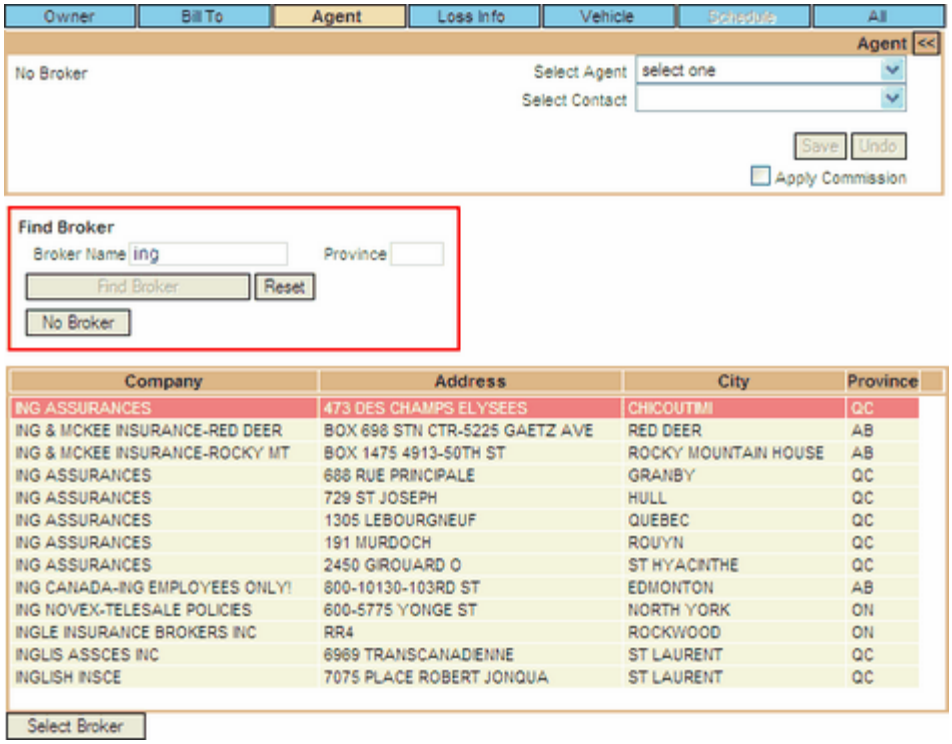
4.3.2.3 Agent Information

If you would like to keep track of an Agent (Broker or Referral) associated with the record, you may save the Agent's information under the Agent tab. This is for tracking purposes and will have no effect on the billing or pricing. If the record needs to be billed directly to the Broker, you must update the bill to on the Owner tab and select the correct Broker on the Bill To tab.

You may look up and record from the list of Insurance Agents or you may use this tab (in conjunction with the Agent Contact records in the C & V Relationship Mgmt module) to track referrals sent to you from outside sources (e.g., car wash and/or oil & lube personnel).

4.3.2.3.1 Broker

If you would like to record the Broker associated with an Invoice, you may look it up and save it on the Agent tab. This will have no effect on the billing or on the invoice pricing. On the Agent tab, enter at least the first three letters of the Broker or the Province and click on the Find Broker *button. This will display a list of matching Brokers from which to choose.*



Find Broker Window

Once you have made your select, click on the Select Broker to save your choice to the record.

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Completed Broker Tab

4.3.2.3.2 Referral Agents

You may also use the Agent Tab (in conjunction with the C&V Relationship Mgmt module) to track referrals from outside agents.

Agent Tab

1. Select an Agent (main location) from the Select Agent drop down list to see all of the Contacts associated with that Agent.

Agent Selection

2. Next, select the Contact from the Select Contact drop down list.

Contact Selection

3. When you have finished with your selections, click on the Save button.

4.3.2.3.3 Apply Commission

In eDirectGlass, you may enter up to three salespersons or writers to pay commissions to on any given record. On the Agent tab, check off the 'Apply Commission' box to view the Sales Commissions screen.

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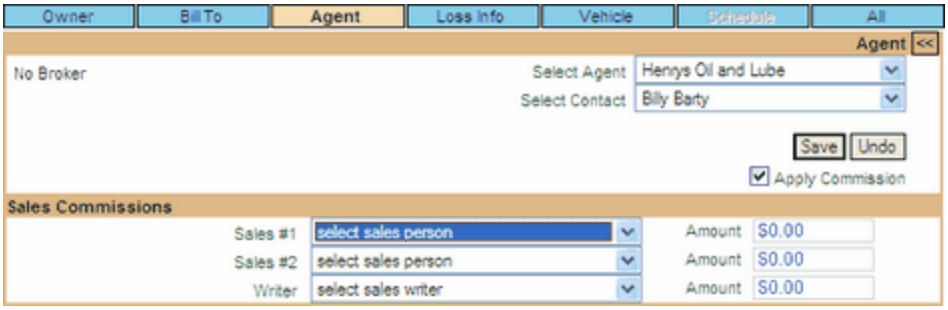


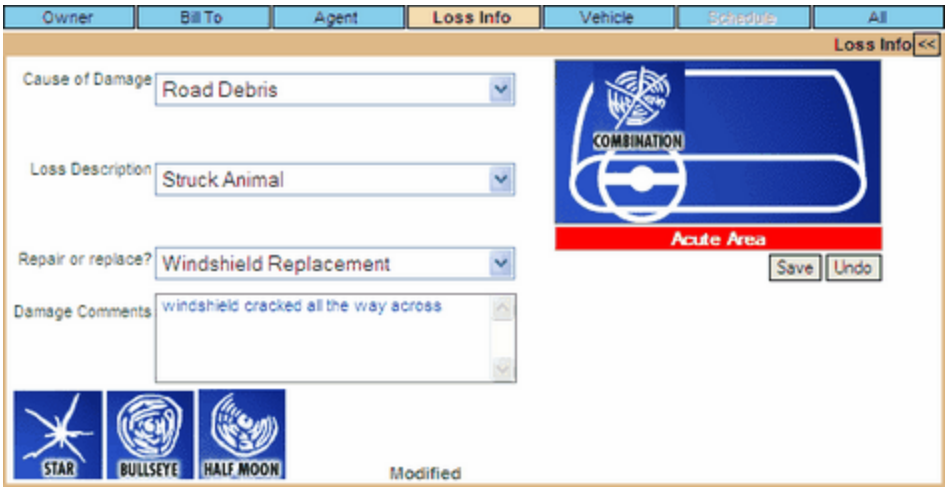
Sales Commissions Screen

Select the correct people from the drop-down list(s) and enter an amount beside that person's name. This information will be saved with this record and will be available for you to run a report to properly pay commissions on an invoice by invoice basis.

4.3.2.4 Entering Loss Info

From the Loss Info tab on the Task Menu, you can enter the type of loss and the detail for the Quote.

1. Select the Cause of Damage, if known, from the drop down box. Select 'Other' to enter your own description.
2. Select the Loss Description, if known, from the drop down box. Select 'Other' to enter your own description.
3. To illustrate the type of damage, simply drag one of the 4 graphic thumbnails to the appropriate area of the windshield graphic.
4. Harmon requires that you select either Repair or Replacement from the drop-down field on this screen.
5. When you are finished, don't forget to click on the Save button. This will take you to the Vehicle tab on the Task Menu.



Loss Info Screen From Task Menu

4.3.2.5 Entering Vehicle Information

This feature will allow you to enter all of the information for the vehicle and will display the parts line items as you build the quote. From the Task Menu, select the Vehicle tab. *Note: You may already be on the Vehicle tab if you saved information from the previous tab.*

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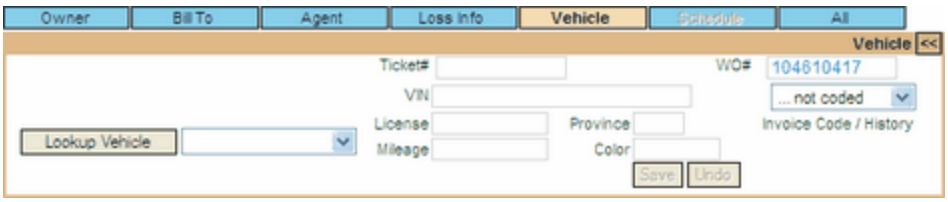
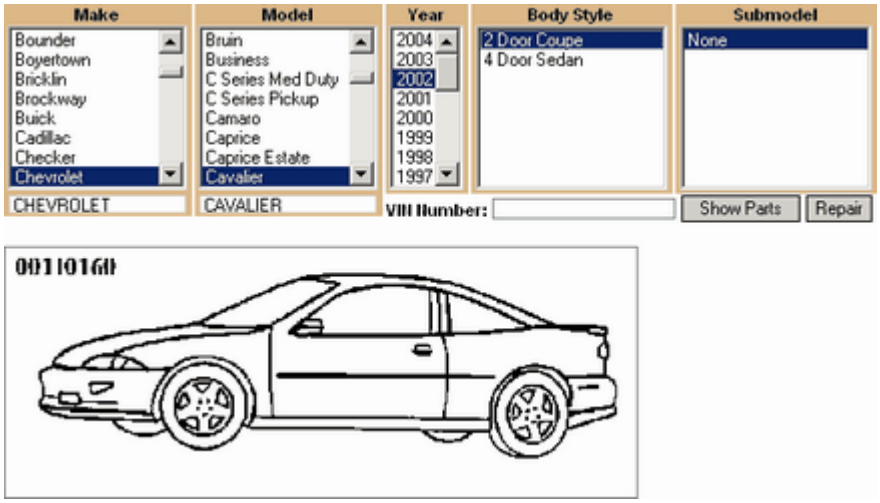


Vehicle Tab Screen

1. If you have a VIN, enter it into the VIN box and click on the Save button. If you do not have a VIN at this point, just go to the next step *(see note below)*.
2. Click on the Lookup Vehicle button to display the Vehicle Build window. If you entered and saved a VIN in the step above, the vehicle will automatically begin to decode as soon as you clicked on the Lookup Vehicle button. The vehicle may not build out all the way and you may have to select additional vehicle information before the Show Parts button becomes active.
3. If you do not have a VIN, you can simply select a Make, Model, Year, Body Style and Submodel instead.
4. If this is a repair, click on the Repair button. This will take you directly to the Add Line Item menu to select repair line items.

   NOTE: If you have selected the Repair button, but need to make this a replacement instead, simply click on the Cancel Repair button. This will take you back to the Vehicle tab, click on the Lookup Vehicle button to take you to the Glass Parts list.

5. Otherwise, click on the Show Parts button to display a list of the glass and associated parts.



Vehicle Build Window

NOTE: We recommend that you enter the VIN as in step 1 above. This will validate the VIN before you go any further in the Quoting process. If you enter in the VIN number after the vehicle has been 'built' and the parts selected, the eDirectGlass system will not be able to validate the VIN.

4.3.2.5.1 Custom Vehicle Information

If you happen to have a vehicle that is not a part of the NAGS Car and Truck database, you can add a Custom Vehicle and select parts from your Private Parts Profile. To add a Custom Vehicle to this

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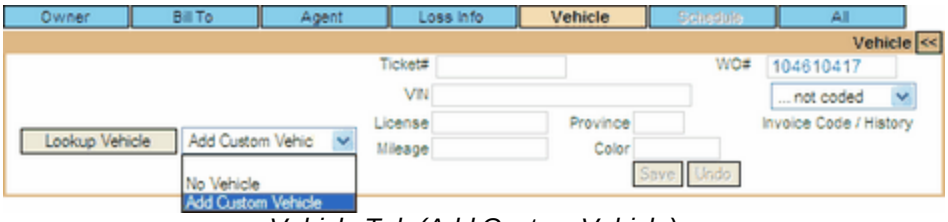
Quote:

1. From the drop down list next to the Lookup Vehicle button on the Vehicle Tab, select Add Custom Vehicle.

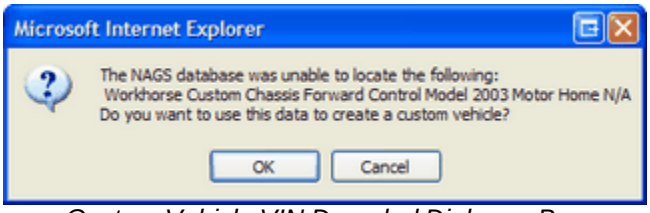


Vehicle Tab (Add Custom Vehicle)

2. If you have a VIN Number for the Custom Vehicle you are adding (e.g., motor home), enter it in the VIN Number box on the Add Custom Vehicle screen which will display in the Work Area once you have chosen "Add Custom Vehicle" from the drop down.

Add Custom Vehicle Screen

3. If the system is able to decode the VIN, you will get a dialogue box asking if you would like eDirectGlass to fill in the decoded information in the appropriate boxes. If you wish the system to handle this, click on the OK button in the dialogue box. If you would like to fill in the information on your own, click the Cancel button and enter the information manually.


Microsoft Internet Explorer
The NAGS database was unable to locate the following:
Workhorse Custom Chassis Forward Control Model 2003 Motor Home N/A
Do you want to use this data to create a custom vehicle?
OK
Cancel

Custom Vehicle VIN Decoded Dialogue Box

4. If you do not have a VIN Number, simply fill in the appropriate fields manually. Once the fields are filled in, either through VIN decoding or manually and you have verified the information is correct, click on the Save button to add the Custom Vehicle to the Quote.

Completed Add Custom Vehicle Screen

5. Once you click on the Save button, you will be returned to the Vehicle Tab in order to add parts to the Quote from your Private Parts list.

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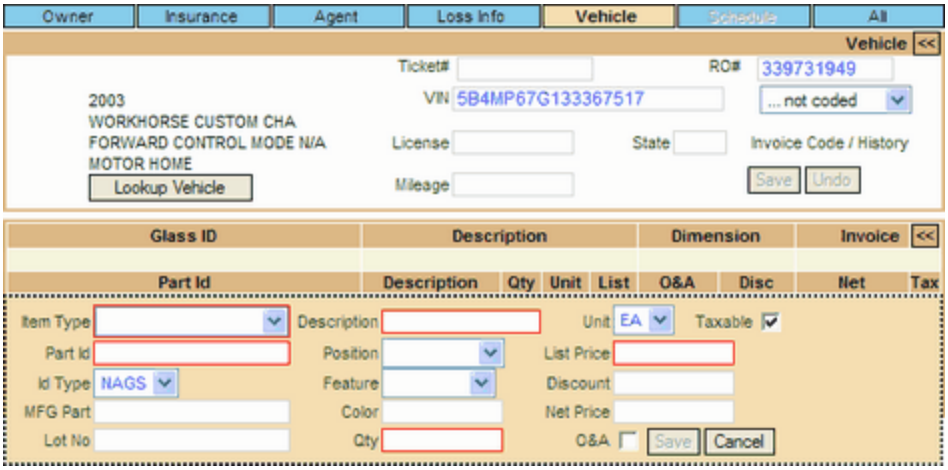
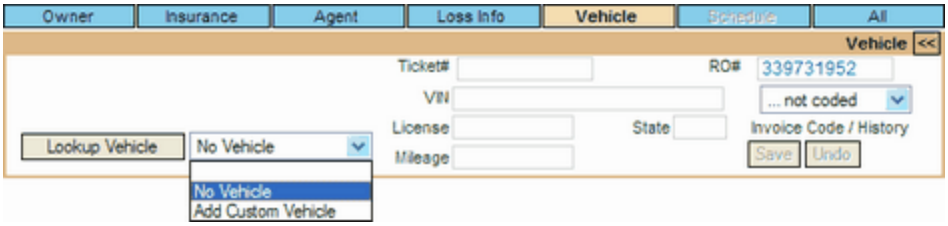


4.3.2.5.2 No Vehicle Information

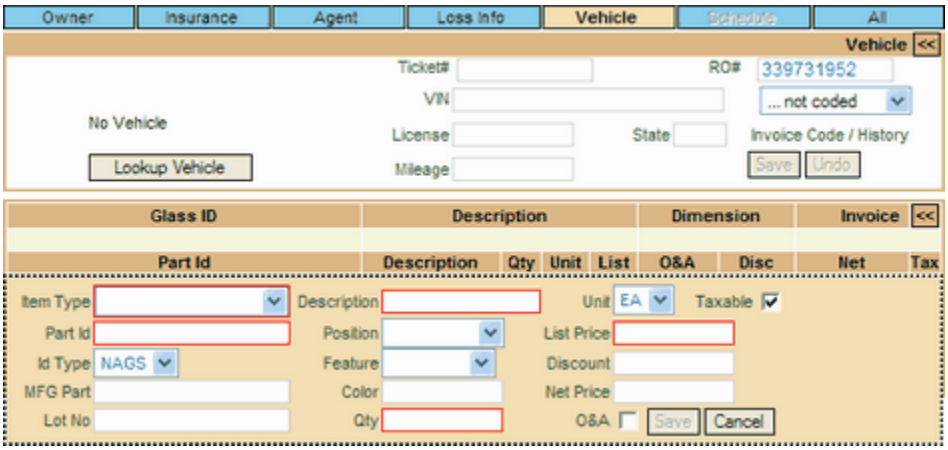
If you need to make a Quote for an item that does not require vehicle information or NAGS parts, you can eliminate the need to enter this information in the eDirectGlass system.

1. From the drop down list next to the Lookup Vehicle button on the Vehicle Tab, select Add Custom Vehicle.



Vehicle Tab (No Vehicle)

2. Once you have selected the "No Vehicle", you will be on the Vehicle Tab in order to add parts to the Quote from your Private Parts list.



4.3.2.5.3 Selecting Parts

Once you have selected your vehicle and clicked on the Show Parts button, you will be taken to the Vehicle Parts window. If the job is to be billed to Owner or Other, the parts list defaults to your Retail

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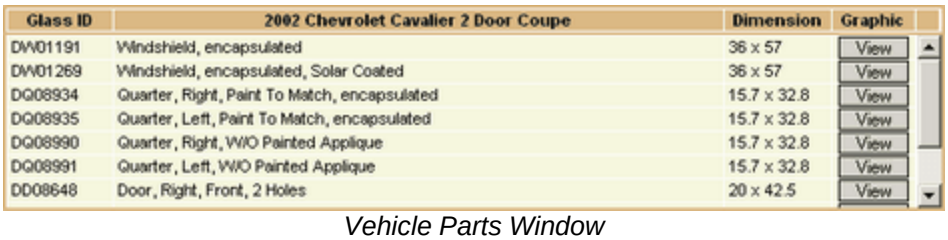
Catalogue. You have the option to select different price lists or catalogues. Simply select it from the drop down before you select the glass part. If it is to be billed to Insurance, Fleet or Broker:

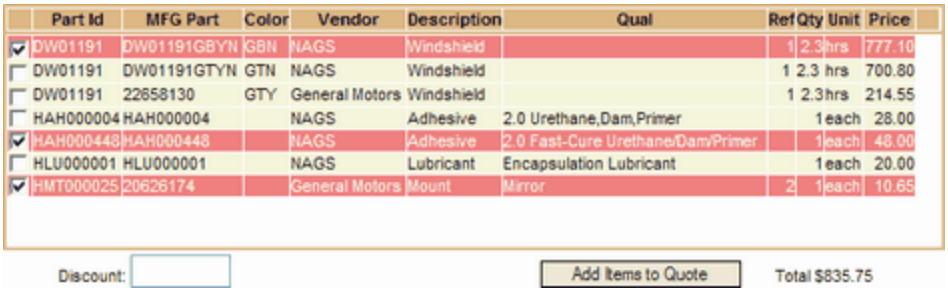

Glass ID
2002 Chevrolet Cavalier 2 Door Coupe
Dimension
Graphic
DW01191 Windshield, encapsulated 36 x 57 View
DW01269 Windshield, encapsulated, Solar Coated 36 x 57 View
DQ08934 Quarter, Right, Paint To Match, encapsulated 15.7 x 32.8 View
DQ08935 Quarter, Left, Paint To Match, encapsulated 15.7 x 32.8 View
DQ08990 Quarter, Right, W/O Painted Applique 15.7 x 32.8 View
DQ08991 Quarter, Left, W/O Painted Applique 15.7 x 32.8 View
DD08648 Door, Right, Front, 2 Holes 20 x 42.5 View

Vehicle Parts Window

1. Choose the Part Type by clicking on the part line. In addition, you can always click on the View button to see the graphics for that specific line item.
2. Once you have selected the Part Type line item, the Part Type sub menu of line items will appear. **Note: If you hover your mouse over the MFG Part box for the glass part, the system will give you additional information about the part. The same is true for the Color column.**
3. Select the items you wish to add to the quote. If you do not know which Glass Part you will actually need for the installation and wish to list more then one on the Quote/Repair Order (e.g, two different colors or windshields with and without rain sensors), you can add the additional windshield simply by placing a check mark next to that glass part as well. You can also apply a discount to the checked parts, by entering in a percentage in the Discount: box. This discount will only apply to the items selected and will not be applied to labor. Interchange parts are listed in magenta on the screen.

   NOTE: This discount should only be applied to a Quote that *will not* be paid by an Insurance company, Fleet company or TPA.

4. Once you have selected all of the parts for this Quote, click on the Add Items to Quote button. Once you do this, you will be automatically taken back to the Vehicle screen from the Task Menu and your line items will now appear. Any discounts you have entered in the Discount: box will be carried over to the Quote.


Part Id MFG Part Color Vendor Description Qual Ref Qty Unit Price
DW01191 DW01191GBYN GBN NAGS Windshield 1 2.3 hrs 777.10
DW01191 DW01191GTYN GTN NAGS Windshield 1 2.3 hrs 700.80
DW01191 22658130 GTY General Motors Windshield 1 2.3 hrs 214.55
HAH000004 HAH000004 NAGS Adhesive 2.0 Urethane,Dam,Primer 1 each 28.00
HAH000448 HAH000448 NAGS Adhesive 2.0 Fast-Cure Urethane/Dam/Primer 1 each 48.00
HLU000001 HLU000001 NAGS Lubricant Encapsulation Lubricant 1 each 20.00
HMT000025 20626174 General Motors Mount Mirror 2 1 each 10.65
Discount:
Add Items to Quote
Total $835.75

Part Type Line Items

4.3.2.5.3.1 Adding Additional Parts

Once you have made the initial selection of parts, you have two ways you can add parts to a Quote. The first deals with adding additional Glass Parts (i.e., adding door glass to a Quote for a windshield). The second deals with adding private parts to a Quote.

1. Once you have made the initial parts selection on a Quote and have hit the Add Items to Quote button, you may then add additional Glass Parts by first clicking on the New Glass Part button located under your parts list.
2. This will take you back to the glass part list. You will notice that the part that you originally

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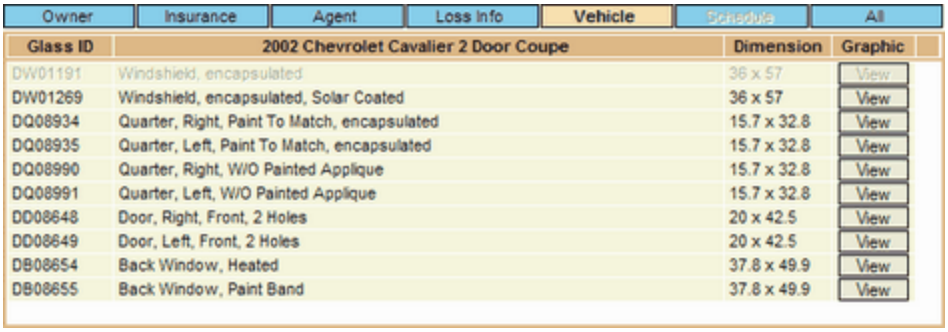
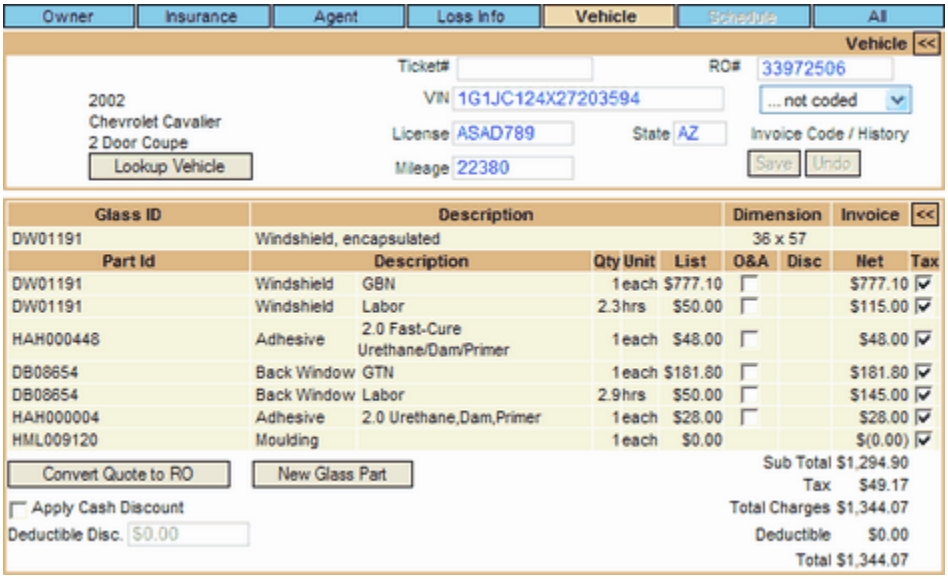
selected from the glass parts list in no longer available for selection.


Owner
Insurance
Agent
Loss Info
Vehicle
Schedule
All
Glass ID
2002 Chevrolet Cavalier 2 Door Coupe
Dimension
Graphic
DW01191 Windshield, encapsulated 36 x 57 View
DW01269 Windshield, encapsulated, Solar Coated 36 x 57 View
DQ08934 Quarter, Right, Paint To Match, encapsulated 15.7 x 32.8 View
DQ08935 Quarter, Left, Paint To Match, encapsulated 15.7 x 32.8 View
DQ08990 Quarter, Right, W/O Painted Applique 15.7 x 32.8 View
DQ08991 Quarter, Left, W/O Painted Applique 15.7 x 32.8 View
DD08648 Door, Right, Front, 2 Holes 20 x 42.5 View
DD08649 Door, Left, Front, 2 Holes 20 x 42.5 View
DB08654 Back Window, Heated 37.8 x 49.9 View
DB08655 Back Window, Paint Band 37.8 x 49.9 View

3. From here you would choose another glass part and add it and it's associated parts to the Quote just as you did with the originally selected Glass Part. Once you have selected the parts to add, just click on the Add Items to Quote button and you will be returned to the Vehicle tab with the newly selected parts showing in list and calculated in the costs. You may do this for as many Glass Parts as you need.



1. To add additional Glass Related Parts (e.g., adhesives, mouldings, etc.) to an existing Glass Part, highlight the glass item you wish to add parts to and new buttons will appear under the parts list.
2. Click on the Add NAGS Item button which will display the part list for the Glass Part you have highlighted. You will not be able to add another Glass Part using this functionality, just the related parts.

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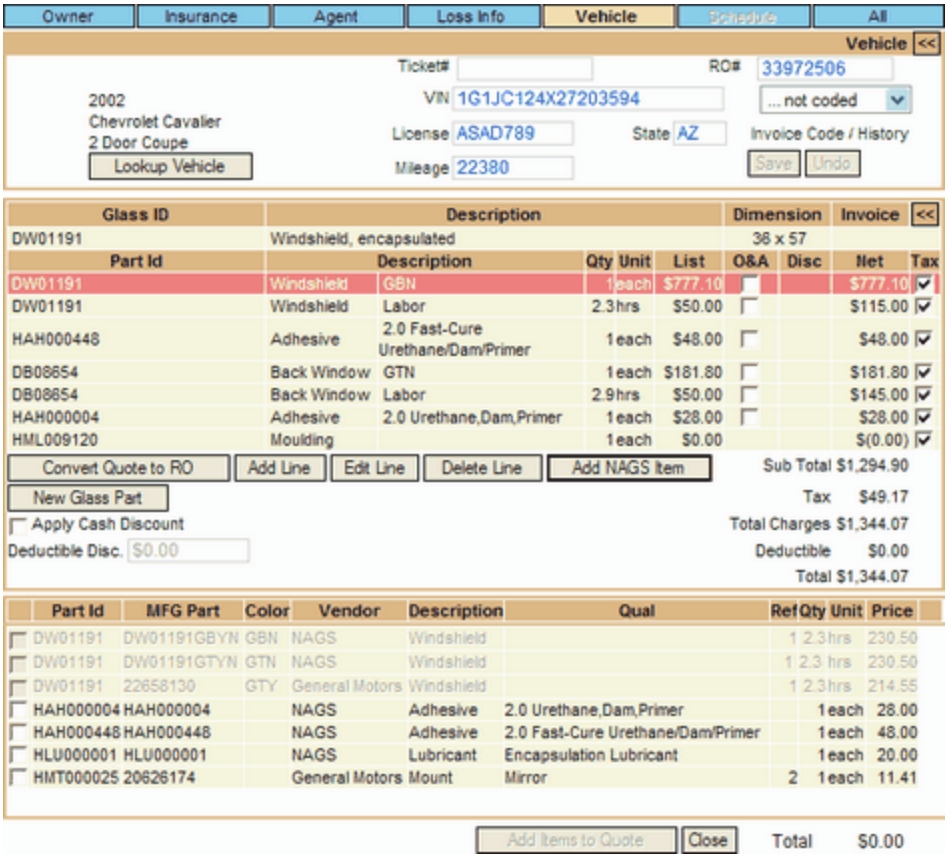
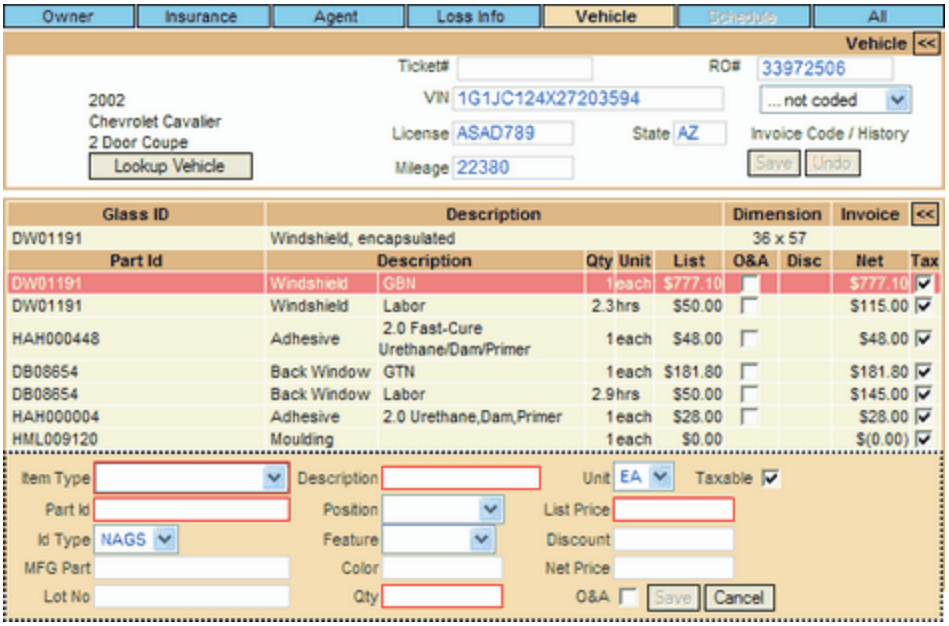


3. Once you have checked off all of the parts you wish to add to the Quote, click on the Add Items to Quote button.

1. From the Vehicle tab, highlight any of the Glass Parts listed on the screen. This will make new buttons appear under the parts list. Click on the Add Line button which will open your Private Parts Profile list.



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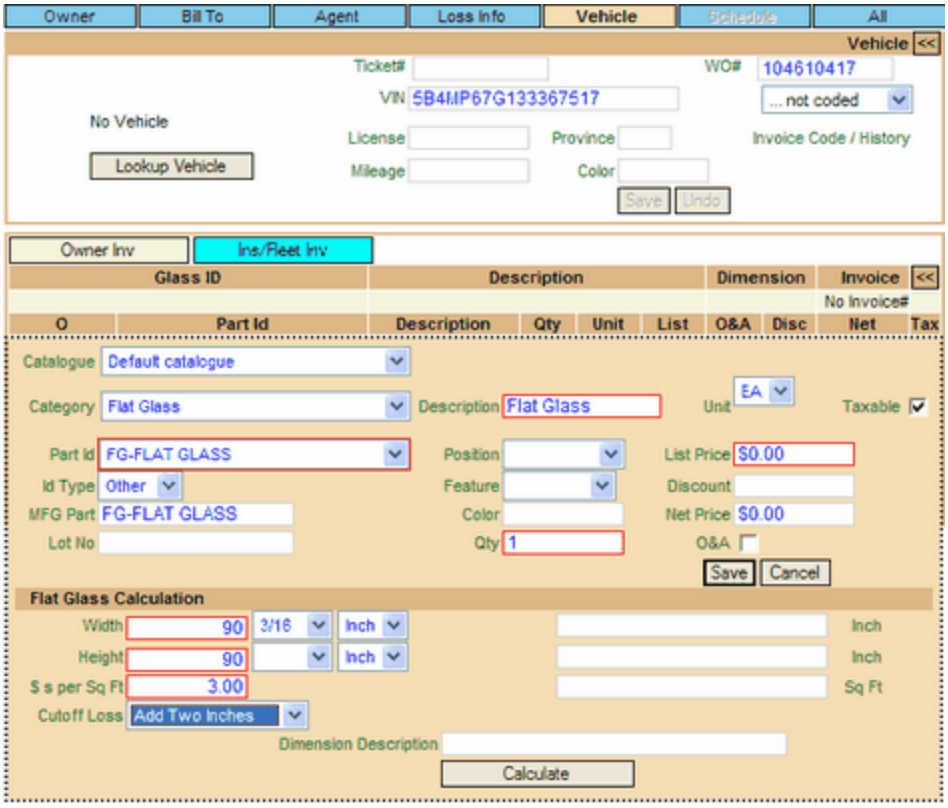
Vehicle Tab with Private Parts Selection Box

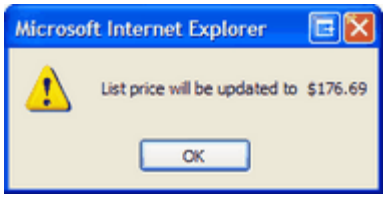
2. Simply choose which of your private parts you wish to add from the Item Type drop down list, adjust the List Price and Qty if necessary and click on the Save button.

Note: If the part is a flat glass item, it will give you the option at this point to enter width, height, price per unit and cutoff loss method.



Flat Glass Calculation Entry

Once you have entered the dimensions, click on the Calculate button. You will get a pop-up box that will display the calculation.



Click on the OK button and then on the Save button to add the Flat Glass part to the record.

4.3.2.5.3.2 Editing & Deleting Parts

If you need to change a price in the system for a line item, following the steps below.

1. Highlight the part you wish to update and a new set of buttons will appear under the parts list.

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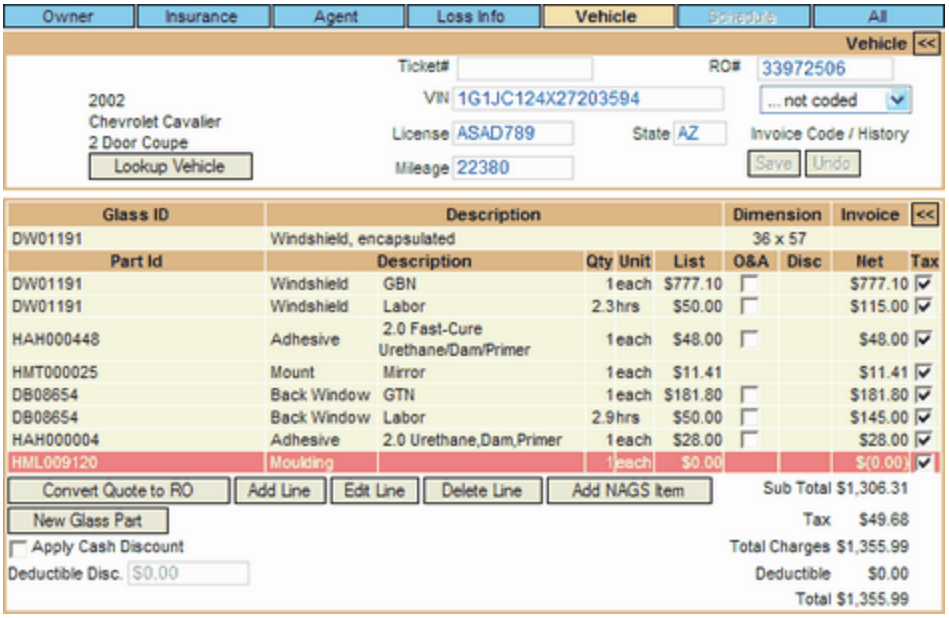
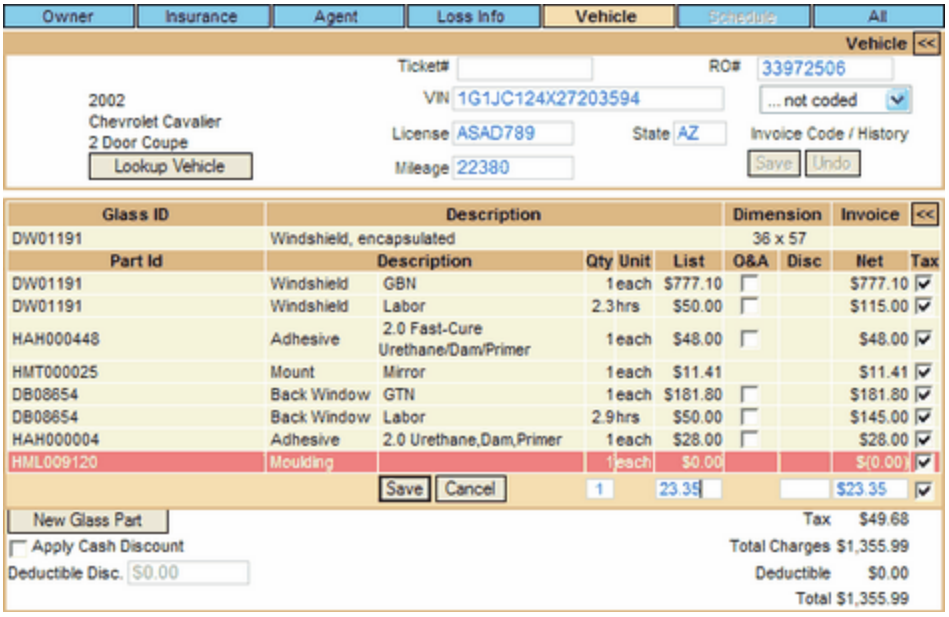


2. Click on the Edit Line button and adjust the price of the line item in the list price box.



3. When you have finished. click on the Save button.

If you would like to delete a line item. simply highlight the line and click on the Delete Line button and click on the OK button in the dialogue box.

4.3.2.5.4 Changing Vehicle

NOTE: If you should need to change the Vehicle you selected originally, all of the parts you added to the Quote will be removed and you will need to select them all again.

1. On the Vehicle tab, click on the Lookup Vehicle button located under the original vehicle's

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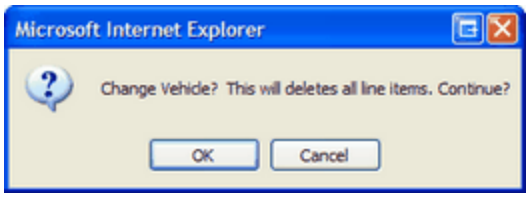
description. You will be prompted by a dialogue box asking if you are sure you wish to change the vehicle and delete all of the line items. Click on the OK button to continue.

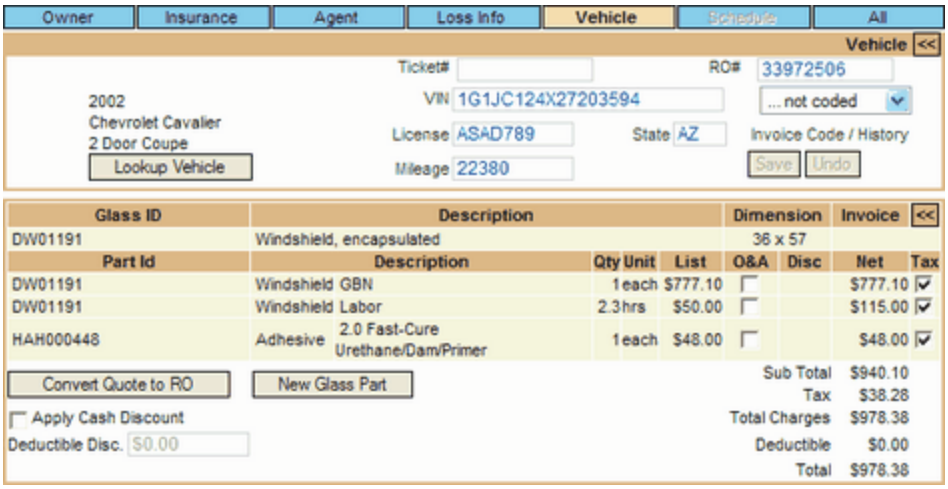


2. You will be taken back to the vehicle build screen where you will need to select a new vehicle (or decode a new VIN) and continue on with the parts selection.

4.3.2.5.5 Finishing Vehicle Information

After you have selected the parts from the Vehicle Parts process, you will be automatically returned to the Vehicle screen from the Task Menu. From here, you can enter additional information, if known, such as the VIN (if you have not already entered and saved the VIN number in the decoding process), License Plate, Ticket # (this is a searchable reference number that your company may use to identify invoices based on a manual ticket number) and Mileage. Remember, you must click on the Save button if you make changes to any one of those fields.

When complete, your Vehicle Information window will look like this:



Complete Vehicle Information Window

NOTE: We recommend that you enter the VIN as in step 1 of the *Entering Vehicle Information* section. This will validate the VIN before you go any further in the Quoting process. If you enter in the VIN number after the vehicle has been 'built' and the parts selected, the eDirectGlass system will not be able to validate the VIN.

4.3.2.5.5.1 RO Number

On the Vehicle Tab screen, you will find an RO # field. This field contains the Store Number (the first 4 digits) and the system generated unique identifier for this particular Quote (RO or Invoice). You are not able to change the information in this box.

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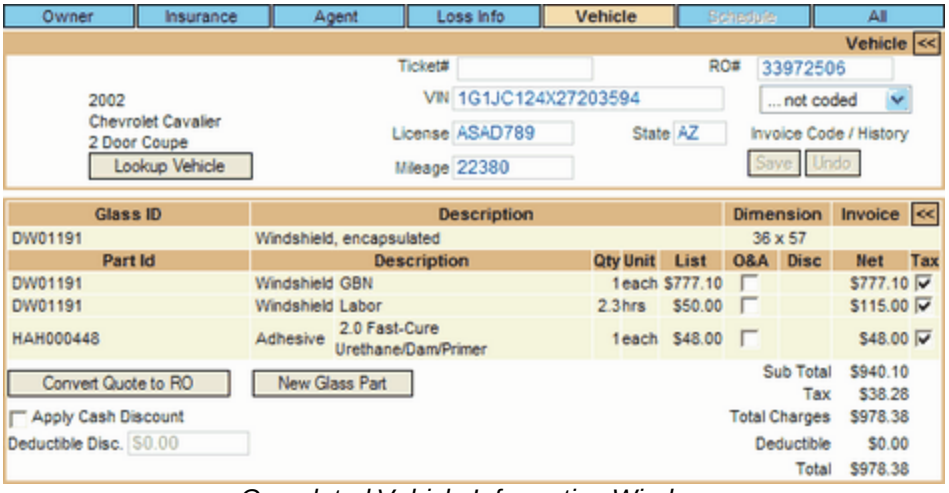
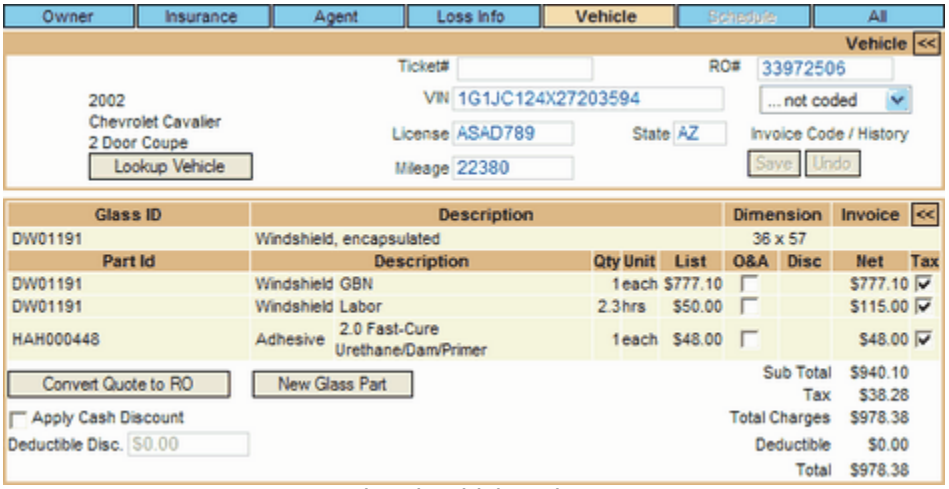


Completed Vehicle Information Window

4.3.2.5.5.2 Ticket Number

On the Vehicle Tab screen, you will find a Ticket # field. This is for you to enter in any 'manual invoice' numbers you may use in your day to day business. This field is for business tracking purposes only and is not required.



Completed Vehicle Tab Screen

4.3.3 Applying Discounts

The eDirectGlass system allows you to manage and apply different types of discounts to a Quote. These discounts include O&A Rules, Cash Profile discounts, promotional Deductible Discounts, as well as, an overall percentage discount to a cash quote. The following section will explain how each of the different discounts can be applied to a Quote.

4.3.3.1 Applying O&A Rules to a Quote

eDirectGlass has two methods for applying Offer and Acceptance rules to jobs. By default, any assignment sent to you through the eDirectGlass system from an Insurance, Fleet or TPA using eDirectGlass is automatically calculated with O&A rules.

When a quote is created from walk-in business or for an Insurance company, Fleet company or TPA who does not use the eDirectGlass system to initiate claims and you will be billing to an Insurance company, Fleet company or TPA, you can quickly and easily manually apply the O&A rules you have

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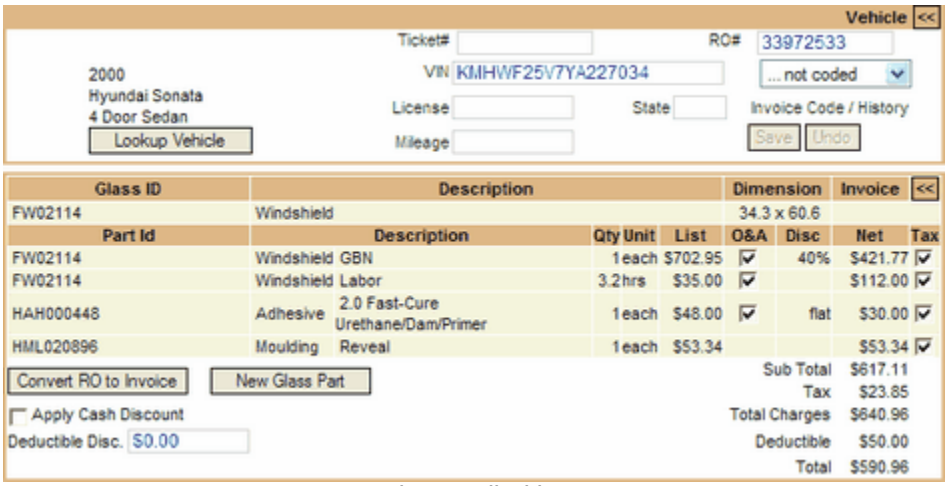
set up in your system *(see C&V Relationship Mgmt - Insurance Contact, of this manual)* for that company.

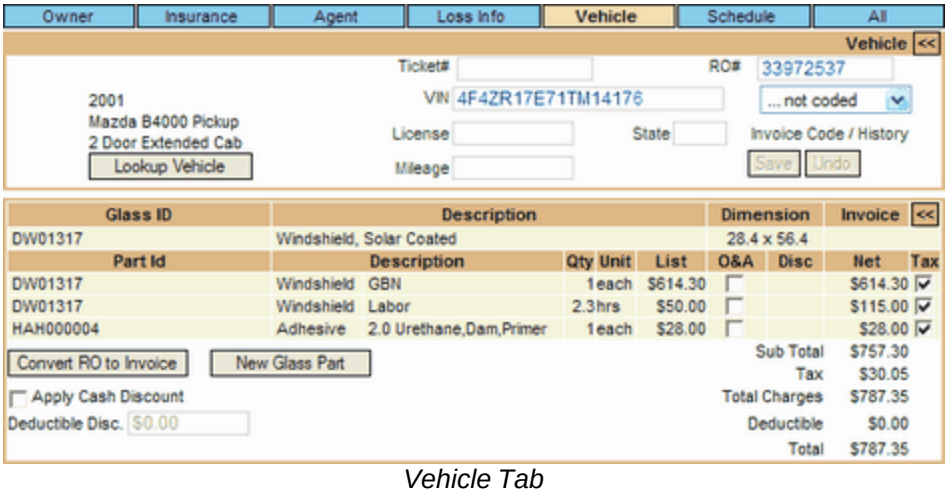
On the Vehicle tab, simply click on the O&A check box in the Parts List and the line items will automatically convert and apply the O&A discounts and pricing rules that you have previously set up in the Insurance Contact Record in the C&V Relationship module of the eDirectGlass system. If you have selected an insurance company that already set up O&A rule for under C & V Relationship Management, these rules will already be applied.



O&A Rules Applied in Quotes

4.3.3.2 Applying Cash Profile Discount

1. Click on the Vehicle tab of an open Quote to display the Vehicle & Line Item information in the Work Area.



Vehicle Tab

2. Click on the box next to the Apply Cash Discount. This will automatically apply the Cash Profile you set up under Administration to this Quote.

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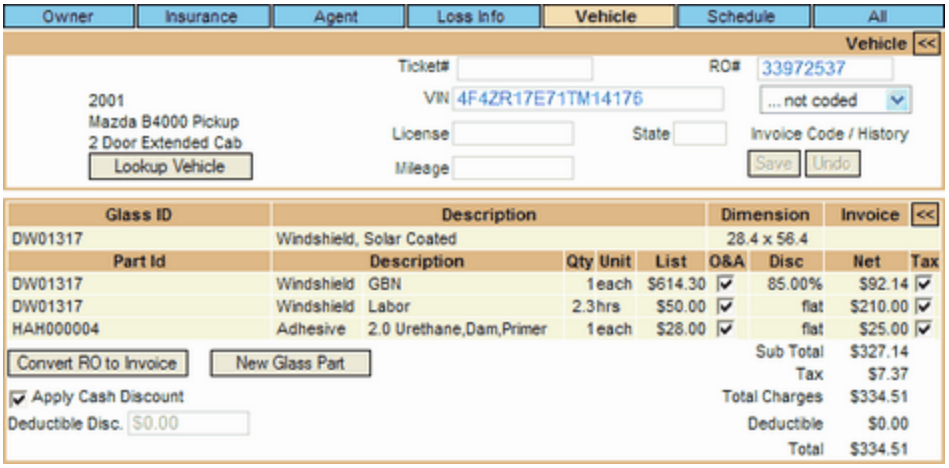


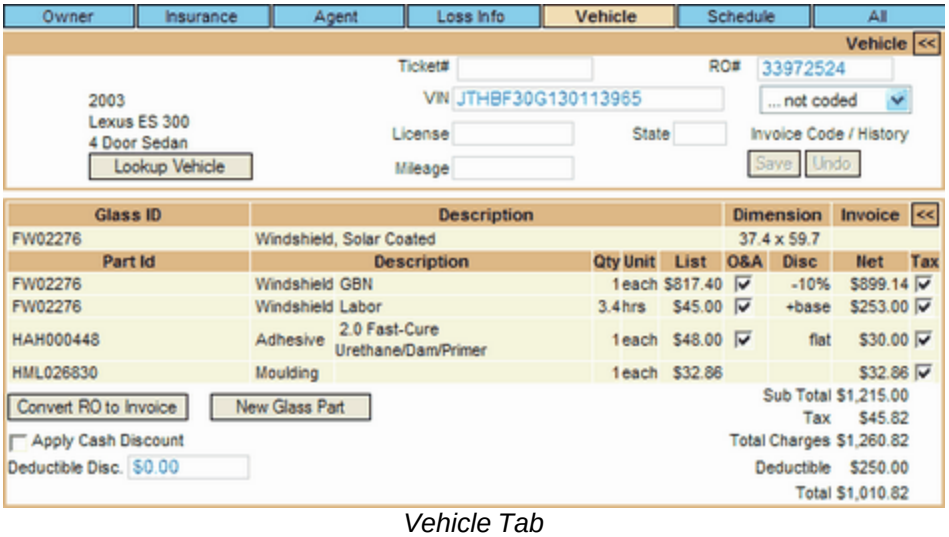
Cash Profile Discount Applied

3. If for some reason you no longer wish to have the Cash Profile Discount applied, simply uncheck the ☐ Apply Cash Discount box.

4.3.3.3 Applying Deductible - Promotional Discount

If you need to reduce the customer's portion of an Invoice (either by applying a discount to the deductible or by applying a promotional amount), you will enter either of those amounts in the following manner:

1. Open the Quote (Repair Order or Invoice) you will be applying the discount to, click on the Vehicle tab to display the Vehicle and Line Item information in the Work Area.



Vehicle Tab

2. In the Deductible Disc. box, enter in the amount by which you wish to reduce the customer's invoice.

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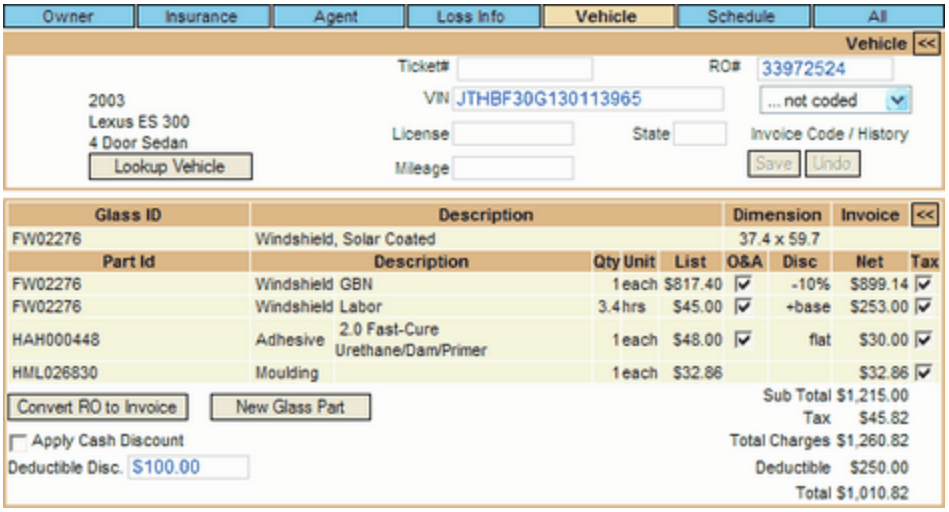
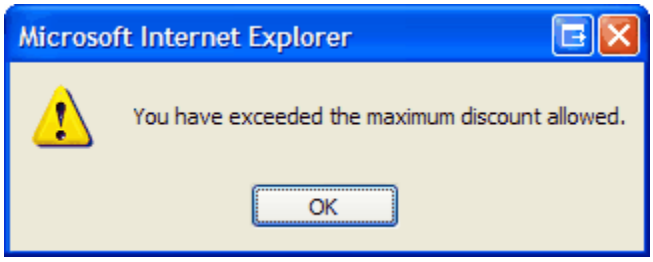


Deductible - Promotion Discount Applied

3. If you exceed the maximum discount allowed by your company (this is set up in the Administration section of eDirectGlass), you will get the following error:



4. If you do get this error, simply change the amount you entered in the Deductible Disc. field to be less than your company's maximum allowable discount.

4.3.4 Printing a Quote

To print a Quote in eDirectGlass (please make sure you have followed all of the steps under Section 1, *Getting Started* before you attempt to print any Quotes):

1. Select and open a Quote.
2. Click on the Print Quote button.
3. The Quote Print Preview screen will open in a new browser window.
4. Click on the button on the report viewer toolbar located under your browser window address bar.

Report Viewer Toolbar

5. A print dialogue box will appear. Select the printer you wish to print to and click on the Print button.

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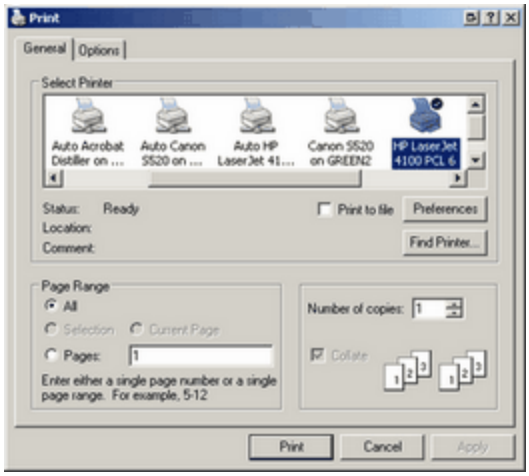


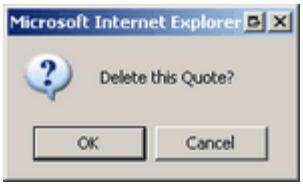
Print Dialogue Box

When you have finished printing, just close the report viewer browser window.

4.3.5 Deleting a Quote

To delete a Quote in eDirectGlass:

1. Open a Quote.
2. Click on the Delete Quote button.
3. A dialogue box will appear asking you if you want to delete the Quote.



Delete Quote Dialogue Box

4. Click on the OK button and the Quote will be permanently deleted.

4.3.6 Converting a Quote to a Work Order

Converting a Quote to a Work Order will allow you to schedule the job and move it toward Invoice status.

1. Open a Quote.
2. Open the **Vehicle** window.
3. Click on the Convert Quote to WO button.
4. The Quote will be converted to a Work Order and the screen will change to the Schedule view in Work Order.

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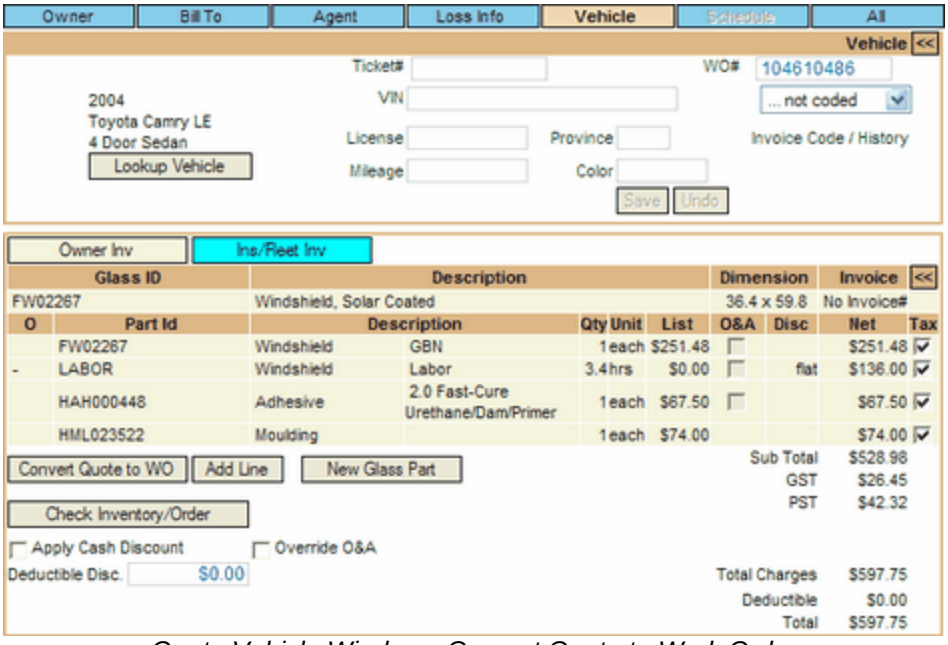
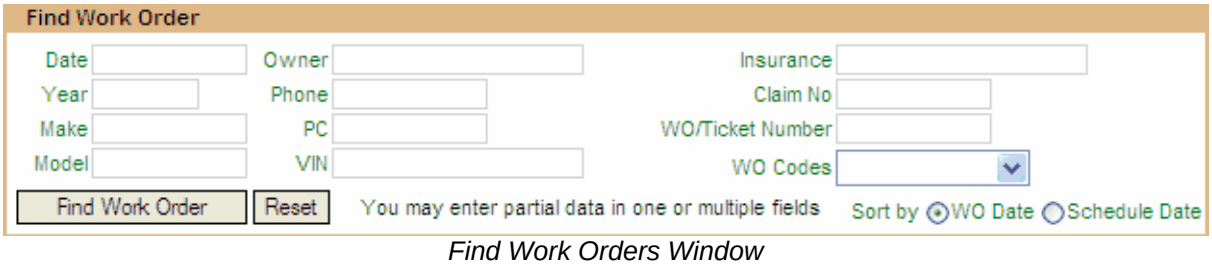


Quote Vehicle Window - Convert Quote to Work Order

4.4 Work Orders

The Work Orders module in eDirectGlass allows you to manage and schedule your jobs. To start, click on the Work Orders button in the Sub Menu. The Find Work Orders window will open in the Work Area.



Find Work Orders Window

4.4.1 Open Work Order

To open and work with a Work Order, click on the Work Orders button in the Sub Menu to open the Find Work Order window.

1. In the Find Work Order window, enter the search information to locate the specific Work Order you wish to work with and click on the Find Work Order button. To see all Work Orders, just click on the Find Work Order button and the list of Work Orders will display in the Work Area.

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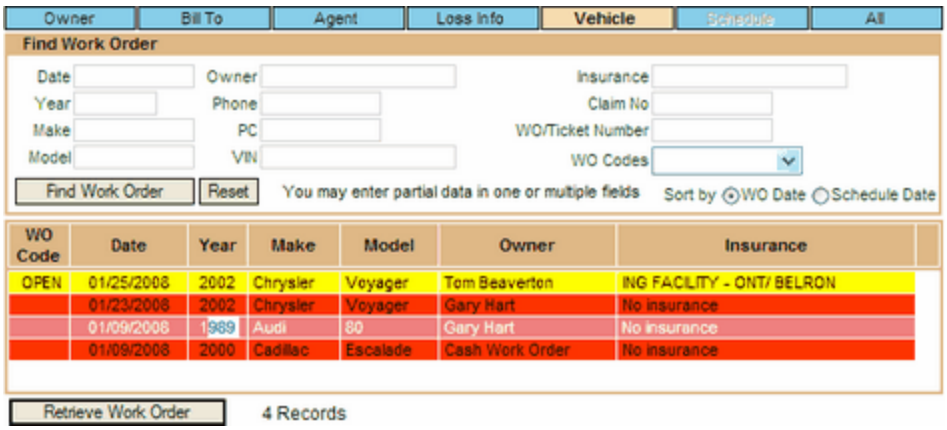


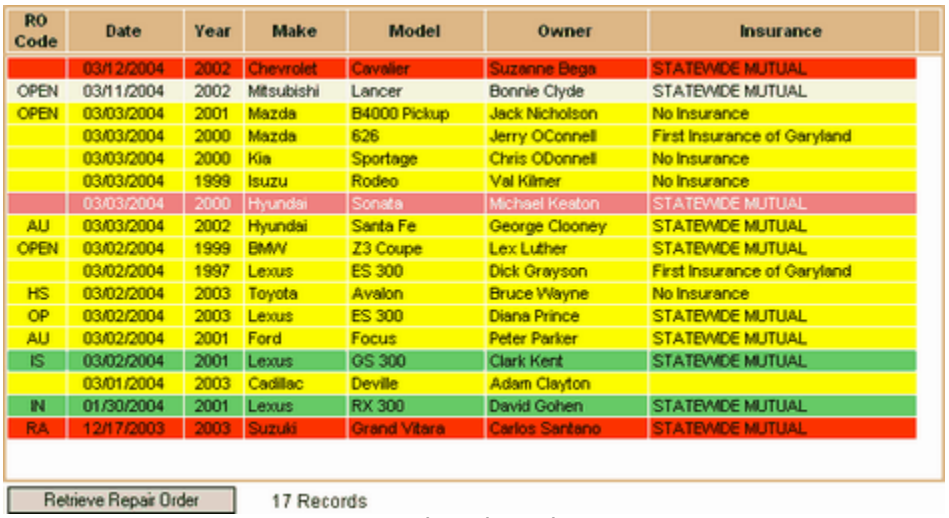
Work Orders List

2. Double-click on the Work Order you wish to open or single-click on a Work Order and click on the Retrieve Work Order button and the Work Order will open.

4.4.1.1 Work Orders List Color Coding

Note: The Work Orders list is color coded for easy identification of items that require attention.

- Red - indicates Work Orders that do not have a schedule date and time in the eDirectGlass system.
- Yellow - indicates Work Orders that have not been marked as completed, but are one or more days past the scheduled date.
- Green - indicates Work Orders that have been marked as completed, but have not yet been converted into an invoice.


RO Code
Date
Year
Make
Model
Owner
Insurance
03/12/2004 2002 Chevrolet Cavalier Suzanne Bega STATEWIDE MUTUAL
OPEN 03/11/2004 2002 Mitsubishi Lancer Bonnie Clyde STATEWIDE MUTUAL
OPEN 03/03/2004 2001 Mazda B4000 Pickup Jack Nicholson No Insurance
03/03/2004 2000 Mazda 626 Jerry OConnell First Insurance of Garyland
03/03/2004 2000 Kia Sportage Chris ODonnell No Insurance
03/03/2004 1999 Isuzu Rodeo Val Kilmer No Insurance
03/03/2004 2000 Hyundai Sonata Michael Keaton STATEWIDE MUTUAL
AU 03/03/2004 2002 Hyundai Santa Fe George Clooney STATEWIDE MUTUAL
OPEN 03/02/2004 1999 BMW Z3 Coupe Lex Luther STATEWIDE MUTUAL
03/02/2004 1997 Lexus ES 300 Dick Grayson First Insurance of Garyland
HS 03/02/2004 2003 Toyota Avalon Bruce Wayne No Insurance
OP 03/02/2004 2003 Lexus ES 300 Diana Prince STATEWIDE MUTUAL
AU 03/02/2004 2001 Ford Focus Peter Parker STATEWIDE MUTUAL
IS 03/02/2004 2001 Lexus GS 300 Clark Kent STATEWIDE MUTUAL
03/01/2004 2003 Cadillac Deville Adam Clayton
IN 01/30/2004 2001 Lexus RX 300 David Gohen STATEWIDE MUTUAL
RA 12/17/2003 2003 Suzuki Grand Vitara Carlos Santano STATEWIDE MUTUAL
Retrieve Repair Order
17 Records

Work Orders List

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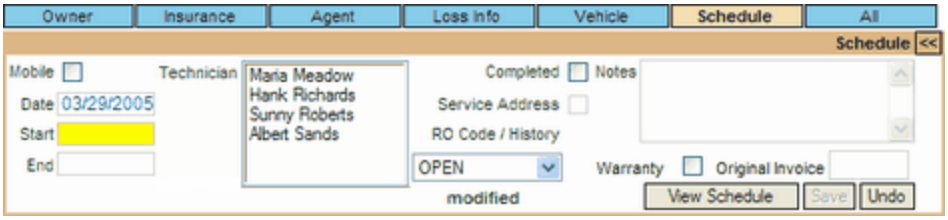
4.4.2 Schedule Work Order

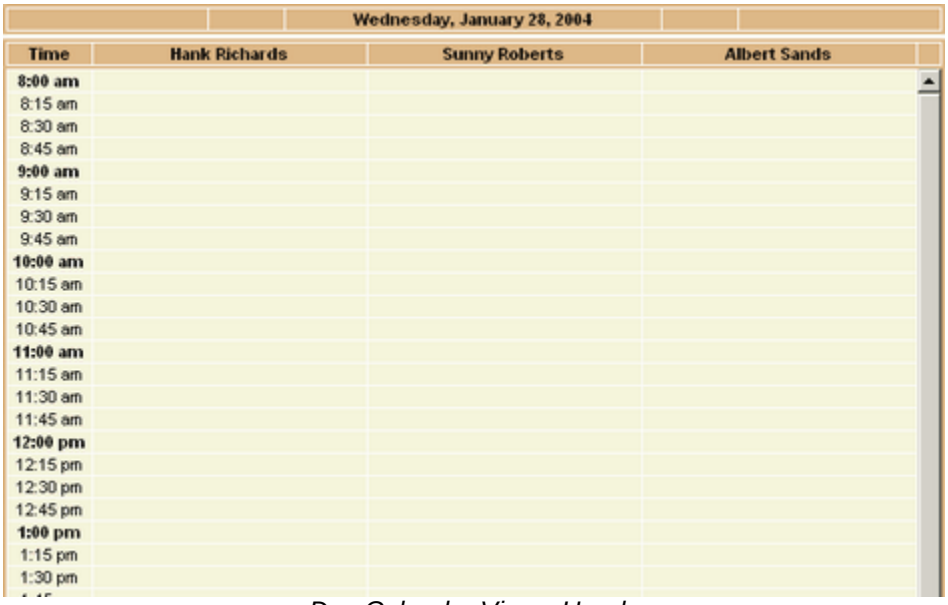
eDirectGlass allows you to manage your production schedule very effectively. In the Work Order module, open a Work Order and click on the **Schedule** tab on the Task Menu. The Schedule window will appear in the Work Area. The way you have set your shop up in the System Admin will determine which schedule view you will see when you click on the **Schedule** tab in a Work Order.

4.4.2.1 Hourly Job Schedule



Hourly Schedule Window

1. Determine whether the job will be Mobile or In-House. If Mobile, click on the check box next to Mobile ☐. You will notice that the names in the Technician Box may change depending on whether or not a Technician was setup as Mobile, In-House or both.
2. Select a Technician by clicking on the Technician's name.
3. Click on the Date field to select an appointment date.
4. The Day Calendar View will display in the Work Area and the Start Time field will be highlighted in the Schedule window.



Day Calendar View - Hourly

5. Click on a Start Time in the Day Calendar View.

NOTE: You must click on the Start Time in the Day Calendar View under the Technician for which you wish to schedule this appointment. If you just click on the Start Time in

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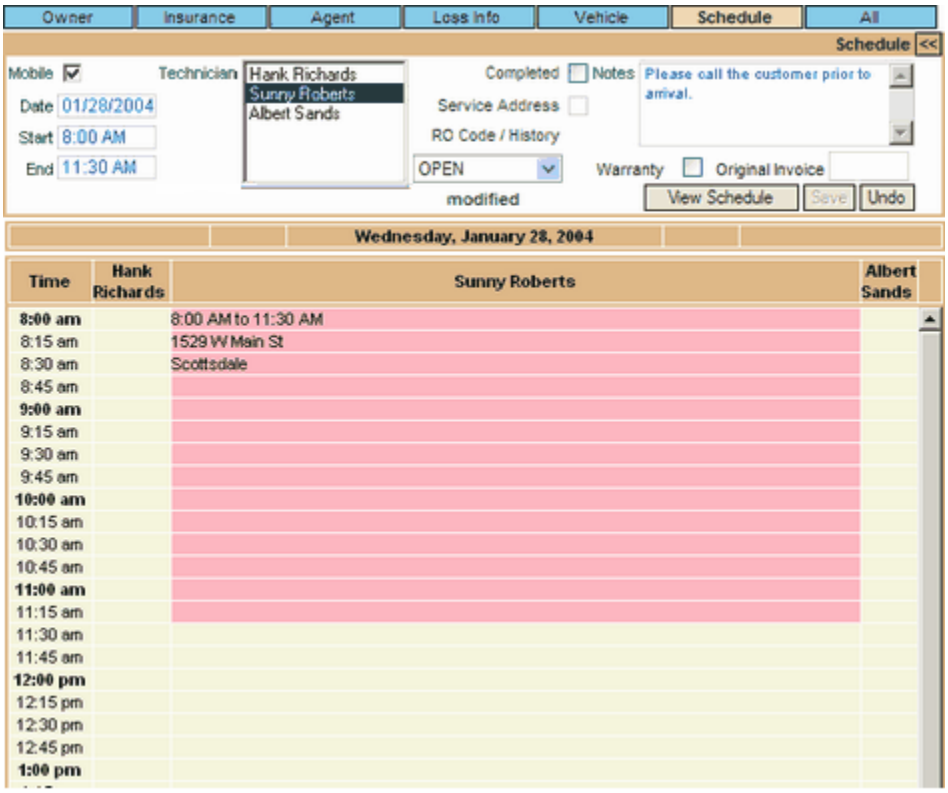
the Day Calendar View in the first column, you will be assigning that job to the Technician whose name appears in the first column and not necessarily to the Technician you wished to assign the job.

6. Click on an End Time in the Day Calendar View (also in the correct Technician's column).
7. Click on the Save button to add the appointment.
8. The appointment will be added to the production schedule and will appear in the Day Calendar View with the appointment details.

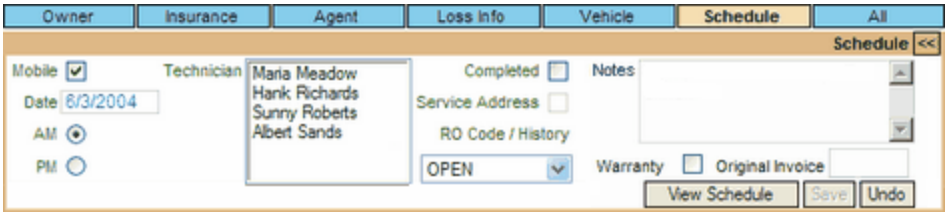


Appointment in the Day Calendar View - Hourly

You can also add Notes that will appear with the appointment, both on the screen and on the print out. These notes will only be available to your account and will not print on the final Invoice. Just type the appointment notes in the Notes box and click on the Save button.

You can also use the Warranty check box to track if this Work Order was a warranty Repair/Replacement. Simply check off the Warranty ☐ check box, enter in information in the Original Invoice box (you must enter in something in this box if you check off the warranty box) and click on the Save button.

4.4.2.2 AM/PM Schedule



AM/PM Schedule Window

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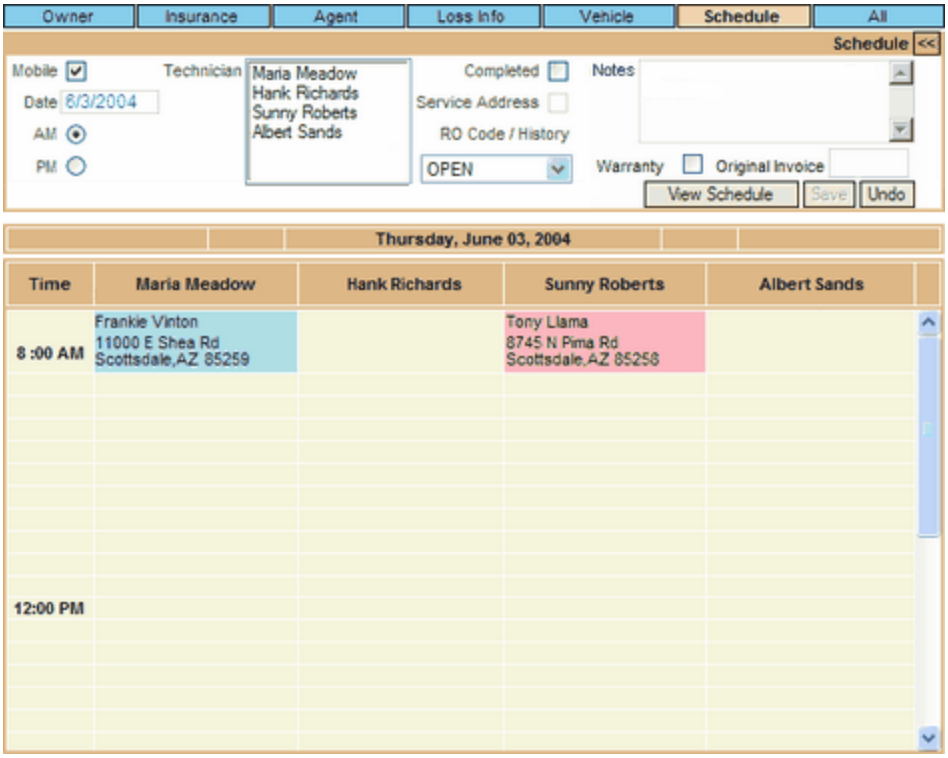
1. Determine whether the job will be Mobile or In-House. If Mobile, click on the check box next to Mobile ☑. You will notice that the names in the Technician Box may change depending on whether or not a Technician was setup as Mobile, In-House or both.
2. Click on the Date field to select an appointment date or click on the View Schedule button if the appointment is for the date already shown in the Date field.
3. The Day Calendar View will display in the Work Area.



Day Calendar View - AM/PM

4. Click in the first available field under the correct Technician's name in either an open AM or PM slot. **Note:** You need to have the correct radio box (AM ◉ or PM ○) selected for this particular appointment and you must also click under the Technician's name in a PM slot for a PM job.
5. Click on the Save button to add the appointment.
6. The appointment will be added to the production schedule and will appear in the Day Calendar View with the appointment details.

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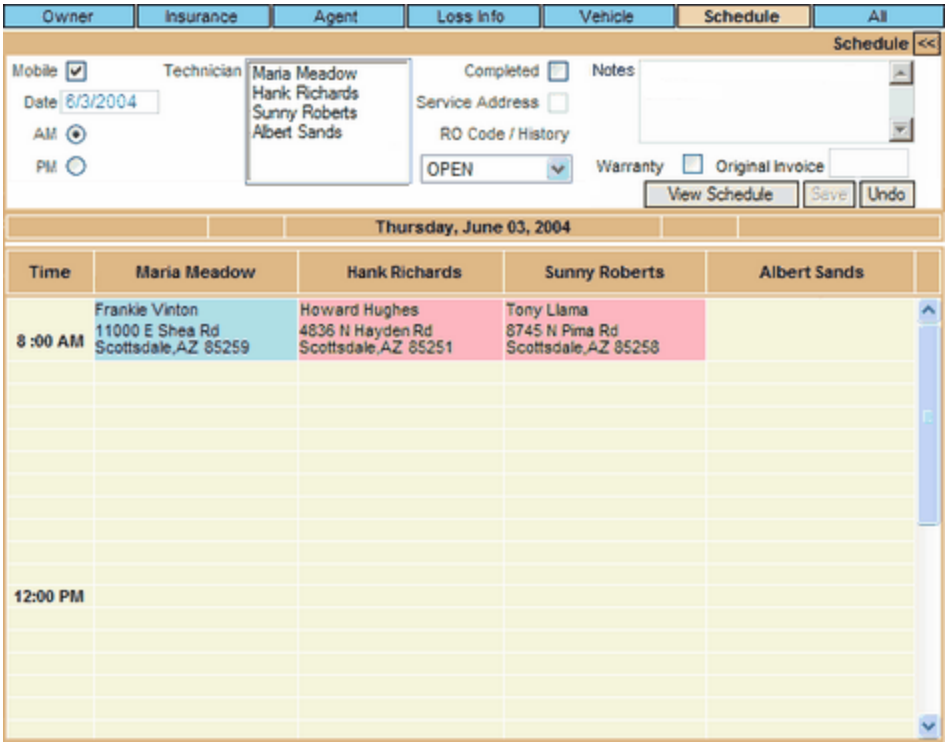

Appointment in the Day Calendar View - AM/PM

You can also add Notes that will appear with the appointment, both on the screen and on the print out. These notes will only be available to your account and will not print on the final Invoice. Just type the appointment notes in the Notes box and click on the Save button.

You can also use the Warranty check box to track if this Repair Order was a warranty Repair/Replacement. Simply check off the Warranty ☐ check box, enter in information in the Original Invoice box (you must enter in something in this box if you check off the warranty box) and click on the Save button.

4.4.3 Service Address

The eDirectGlass system allows you to store a Service Address in addition to the Owner's home address which is recorded on the Owner tab. This Service Address will appear on the Work Order print out.

1. Open the Work Order to which you wish to add the Service Address.
2. When you open the Work Order, the Service Address button will appear in the Sub Menu. Click on the Service Address button to display the Service Location Record window in the Work Area.

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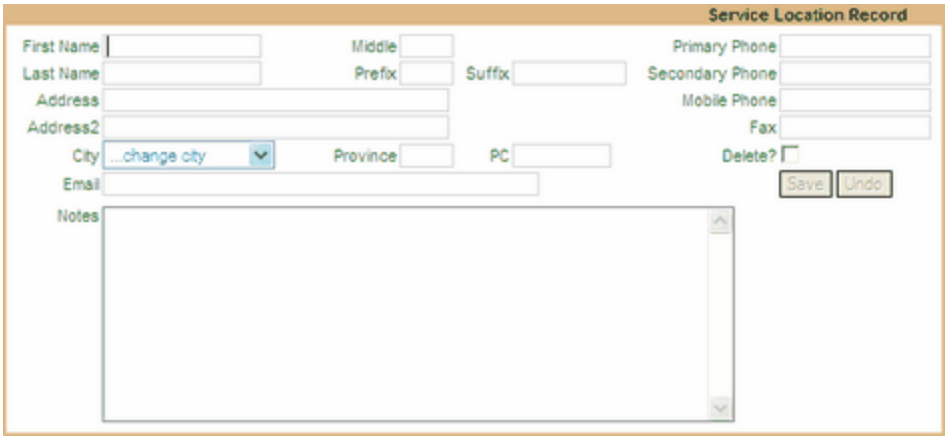
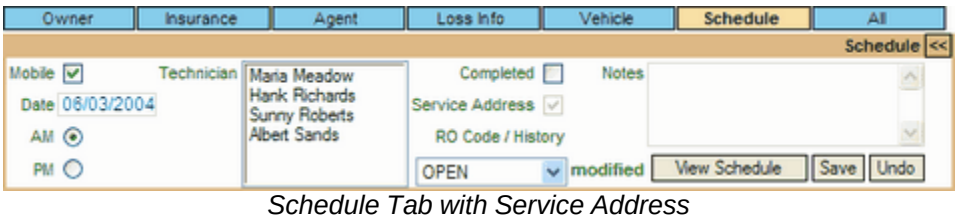


Service Location Record Window

3. Fill out all of the pertinent information including any notes (you can use the notes section for cross street information).
4. When you have finished, click on the Save button.
5. Click on the yellow Work Order button (the Sub Menu header) to return to the Work Order you were working with.
6. The Schedule tab of the Work Order with a Service Address will have a check mark in the Service Address box letting you know that one has been saved for this record.



Schedule Tab with Service Address

7. Should you need to make changes to the Service Address, simply click on the Service Address button in the Sub Menu after you have opened the Work Order, make the necessary changes then click on the Save button when you have finished.
8. If you need to remove the Service Address entirely, place a check mark in the Delete? box in the Service Location Record and then click on the Save button. **NOTE: Checking the delete box and saving the record will permanently remove the Service Address from this record. If you accidentally delete the Service Address from the record, you will need to re-enter all of the information.**

4.4.4 Using WO Codes

This section will discuss using and tracking the Work Order (WO) Codes you added during the eDirectGlass Administration set up. These codes will help you keep track of your outstanding WO's and their status.

4.4.4.1 Applying WO Code

The Schedule tab is also the screen where you will update the WO Code for this particular Work Order. Just select the appropriate WO Code from the drop down list and click on the Save button.

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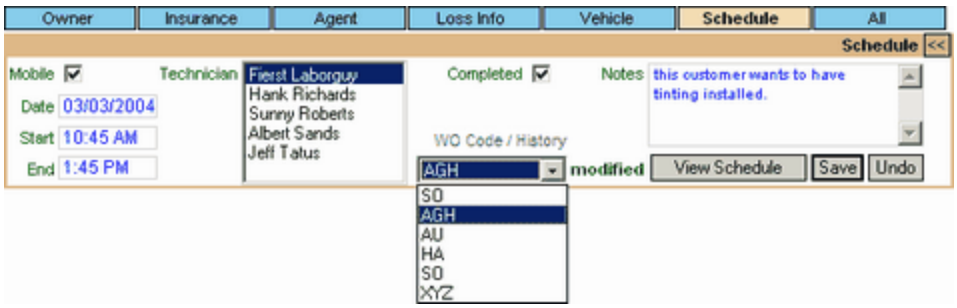
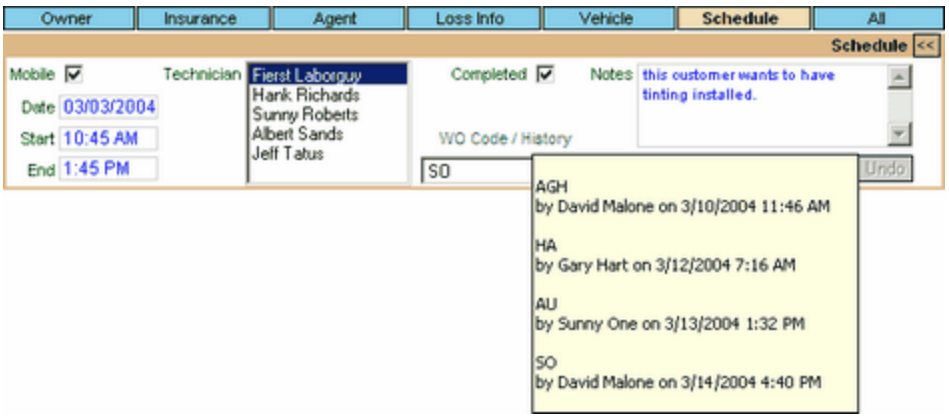


WO Code Drop Down List

4.4.4.2 WO Code History View

You can also view the history of the WO Code changes by placing your mouse over the WO Code / History header to show the user name and date & time stamp of the WO Code change(s).



WO Code History View

4.4.5 Attachments

eDirectGlass allows users to attach documents directly to the claims record. Documents such as customer signed work orders, parts purchase orders and network paper authorization can become a permanent part of the electronic claim. You can import the images directly from your scanner (or other TWAIN device) or attach image files that have been saved on your computer already.

NOTE: Please make sure you follow all of the set up items under Section 1, *Getting Started* of this manual before you use this function for the first time.

4.4.5.1 Add Attachment

1. Click on the Quotes & Invoicing button on the Menu Bar.
2. Select the appropriate Sub Menu button (Quotes, Work Orders or Invoicing) to find the record you need.
3. Search and find the appropriate record and double-click on the line.
4. Once the record is open, the Add Attachment and the View Attachment buttons will be displayed in the Sub Menu.
5. Click on the Add Attachment button and the Image Attachment screen will open in another browser window.

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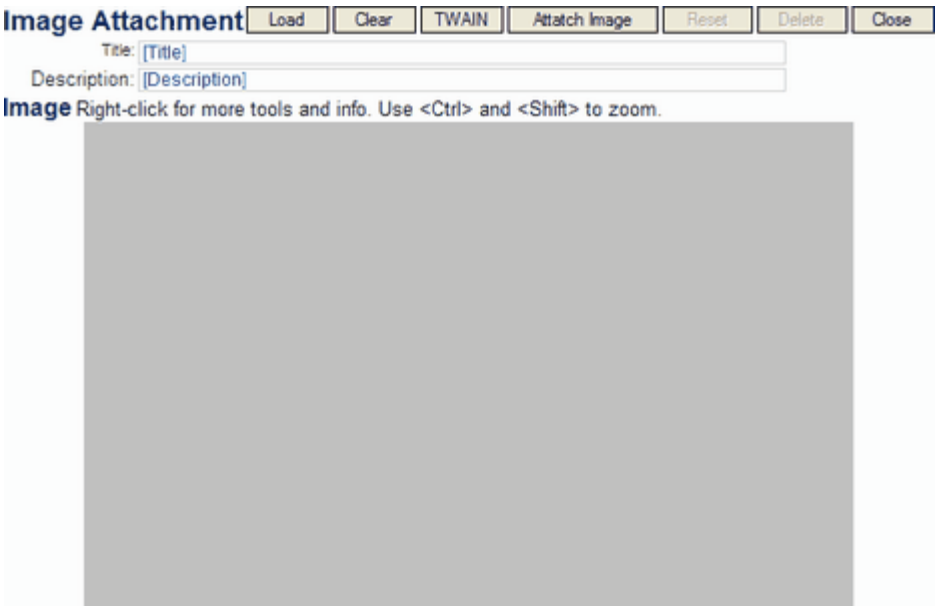

Image Attachment Window

4.4.5.1.1 Attach Saved Image

1. To attach a file that has been previously saved on your computer, click on the Load button. This will bring up the image find/open window in the Work Area. Locate the folder where the image was saved, highlight the image and then click on the Open button to load the image in the Image Attachment Screen.

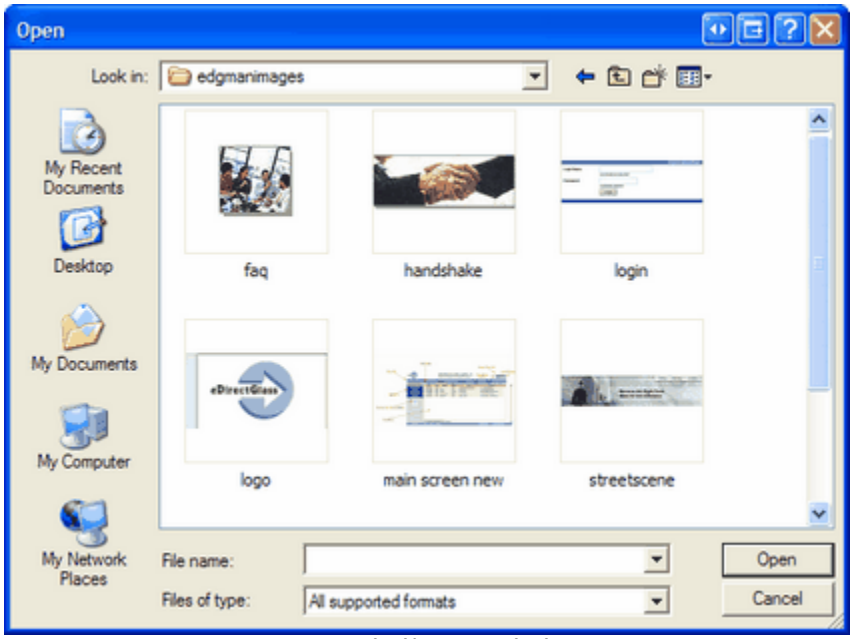

Image Find/Open Window

2. Enter in a Title and Description for the image to help you identify the item later, then click on the Attatch Image button to add the image to the record.

IMPORTANT NOTE: Due to the nature of the database eDirectGlass uses, the use of an

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apostrophe (') often causes problems when you are trying to save records. In order to avoid lost data, we suggest you do not use an apostrophe (') anywhere in the system at any time.

Completed Image Attachment Window.

4.4.5.1.2 Attach Image Directly from TWAIN Device

1. To attach an image directly from your TWAIN device, click on the TWAIN button in the Image Attachment browser window to bring up the Acquire dialogue box.

Acquire Dialogue Box

2. Choose the correct TWAIN device from the drop down list (this could be your scanner, your digital camera, your card reader, etc.). Click on the Acquire button to import or scan the image. If you have the Show UI check box checked off, your normal User Interface for that device will come up and you can proceed normally from there.
3. Once the image has been obtained, click on the OK button in the Acquire dialogue box. **NOTE** If you do not click on the OK button, the image will not be available to you for attachment.
4. Enter in a Title and Description for the image to help you identify the item later.
5. If you are satisfied with this image, click on the Attatch Image button to add this image to the record.
6. When you have finished attaching images, click on the Close button in the Image Attachment window.

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4.4.5.2 View Attachments

1. Click on the Quotes & Invoicing button on the Menu Bar.
2. Select the appropriate Sub Menu button (Quotes, Work Orders or Invoicing) to find the record you need.
3. Search and find the appropriate record and double-click on the line.
4. Once the record is open, the Add Attachment and the View Attachment buttons will be displayed in the Sub Menu.
5. Click on the View Attachment button and the Attachments window will open in another browser window.

Attachments Window

6. Click on the View link next to the item you wish to view.
7. When you have finished reviewing this image, click on the Back to Menu button in your browser window to return to the Attachments window to view any remaining images.
8. When you have finished with your review, just close the Attachments window browser window.

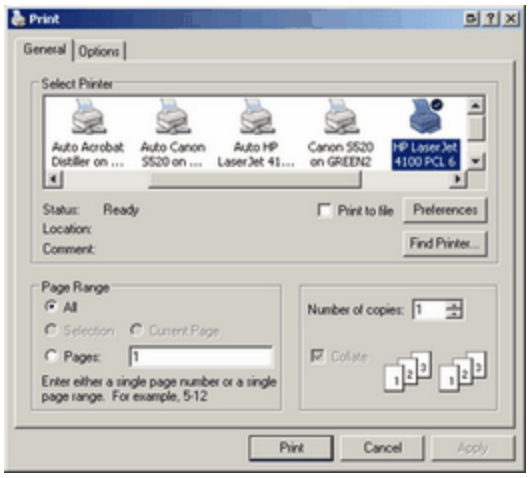
4.4.6 Print Work Order

eDirectGlass allows you to print Work Orders for In-house and Mobile use (please make sure you have followed all of the steps under Section1, *Getting Started* before you attempt to print any Work Orders).

1. Select a Work Order from the Work Order List.
2. Click on the Print Work Order button.
3. The Work Order Print Preview screen will open in a new browser window.
4. Click on the button on the report viewer toolbar located under your browser window address bar.

Report Viewer Toolbar

5. A print dialogue box will appear. Select the printer you wish to print to and click on the Print button.



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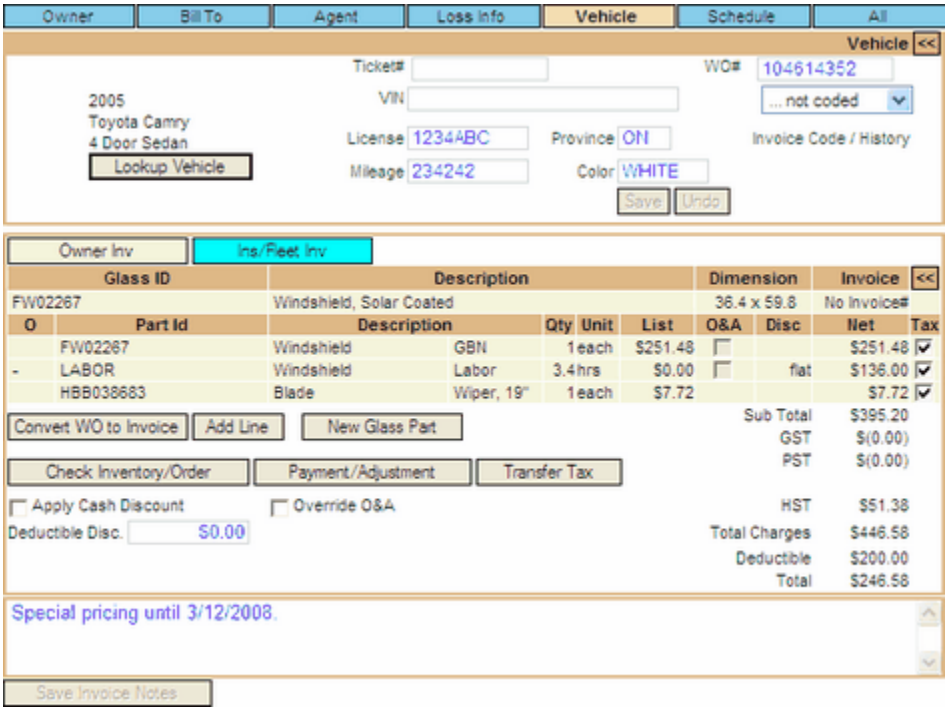
Print Dialogue Box

When you have finished printing, just close the report viewer browser window.

4.4.7 Converting Work Order to Invoice

When a Work Order has been completed, it must be converted to an Invoice so it can be billed appropriately. You can make any modifications to the Work Order that you wish or make changes in the Invoice process prior to submission. Once an invoice has been submitted, no changes can be made.

1. Open the Work Order and click on the **Schedule** tab button.
2. Click on the Completed ☑ check box and then click the Save button.
3. Click on the **Vehicle** tab button.
4. Click on the Convert WO to Invoice button and the Work Order will be converted to an Invoice and will take you to the Invoice Vehicle window.



Invoice Vehicle Window

4.4.8 Apply A Payment or Make an Adjustment

Once the record has been converted to a Work Order, you can also apply a payment or make an adjustment to the record directly from the **Vehicle** tab. You can also may a payment or apply an adjustment from the record once it has been converted to an Invoice. Payments and Adjustments can also be handled from the Accounting menu.

1. On the **Vehicle** tab of Work Order (or Invoice) record you wish to make a payment or adjustment to, click on the Payment/Adjustment *button.*

2. Choose either 'Apply a Payment', 'Make an Adjustment' or 'Cancel Posted Payment'.

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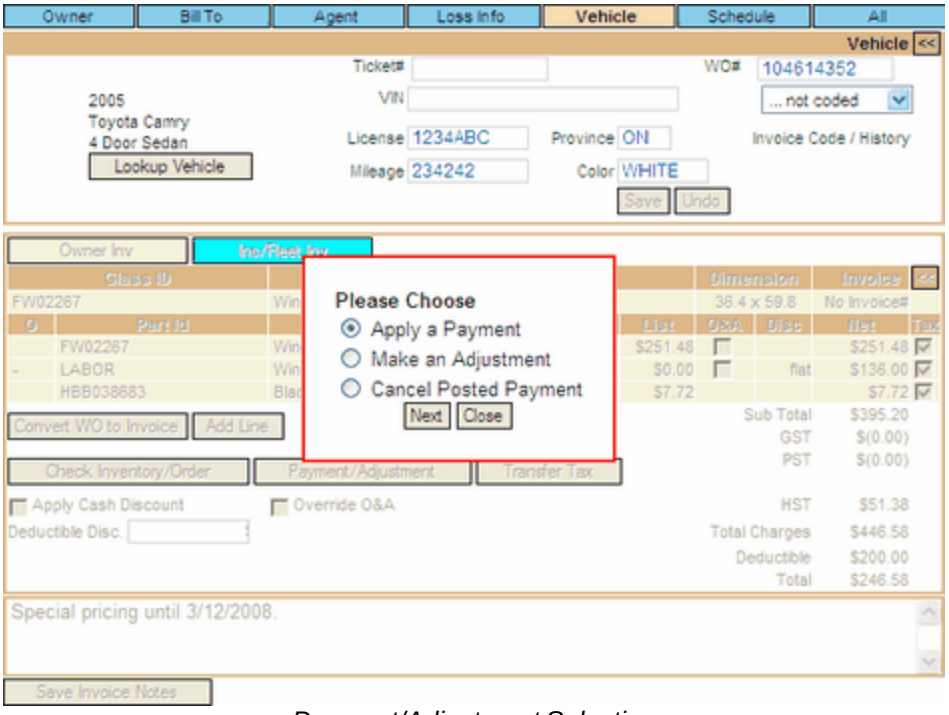
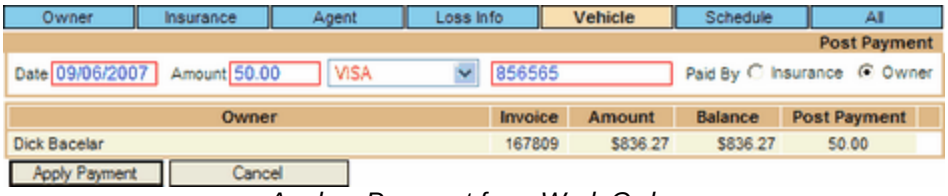


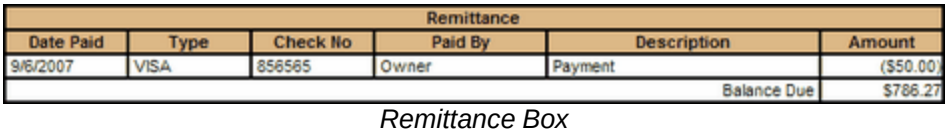
Payment/Adjustment Selection

3. If you selected *'Apply a Payment'*, enter the payment amount, select the payment type, enter the referral number and choose whether the 'Paid By' is Insurance or Owner and then click on the Apply Payment button.



Apply a Payment from Work Order

4. You will then be taken back to the **Vehicle** tab of the Work Order record you were working with and will now see the Remittance box showing the payment you just applied.



Remittance					
Date Paid	Type	Check No	Paid By	Description	Amount
9/6/2007	VISA	856565	Owner	Payment	($50.00)
				Balance Due	$786.27

Remittance Box

5. If you selected *'Make an Adjustment'*, enter the Amount Adjusted (if you are adding an amount you will need to enter a negative number), and the Reason for the adjustment then click on the Adjust Invoice button. **NOTE: eDirectGlass will automatically apply taxes to the Adjustment amount unless you UNCHECK the** Calculate Tax ☐. *The* Credit Adjustment ☐ **box is used to note a payment that has already been applied in the eDirectGlass system, but for another invoice (a fully credited invoice).**

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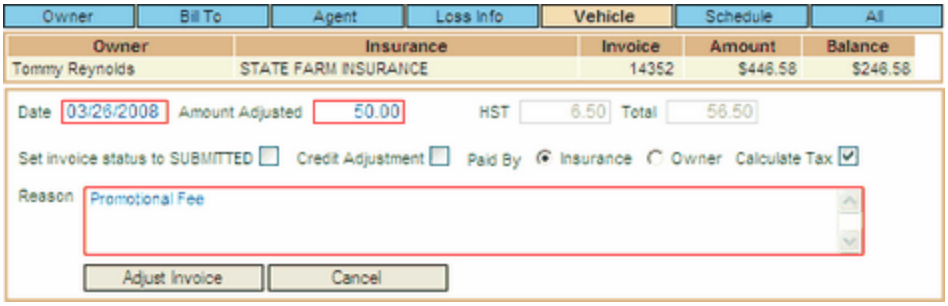

Make an Adjustment from Work Order

6. You will then be taken back to the **Vehicle** tab of the Work Order record you were working with and will now see the Remittance box showing the adjustment you just applied.

Remittance					
Date Paid	**Type**	**Check No**	**Paid By**	**Description**	**Amount**
9/6/2007	VISA	856565	Owner	Payment	($50.00)
9/6/2007	Adjustment	Adjustment	NA	Scratched decal.	($10.00)
				Balance Due	$776.27

Remittance Box

4.5 Scheduling

The Scheduling module allows you to review your production schedule for a specific date or range of dates and allows you to see your entire In-House and Mobile schedule.

4.5.1 Viewing Schedule

1. Click on the Scheduling button in the Quotes & Invoicing Sub Menu.
2. Select a Date Range by clicking on the Date field, choosing the start date, clicking in the To Date field and choosing the end date of the schedule you wish to display. You can also choose to display the schedule for one particular technician (the schedule defaults to All Technicians) by choosing that Technician's name from the drop down list and clicking on the View Schedule button.
3. The Schedule for the selected dates will display.

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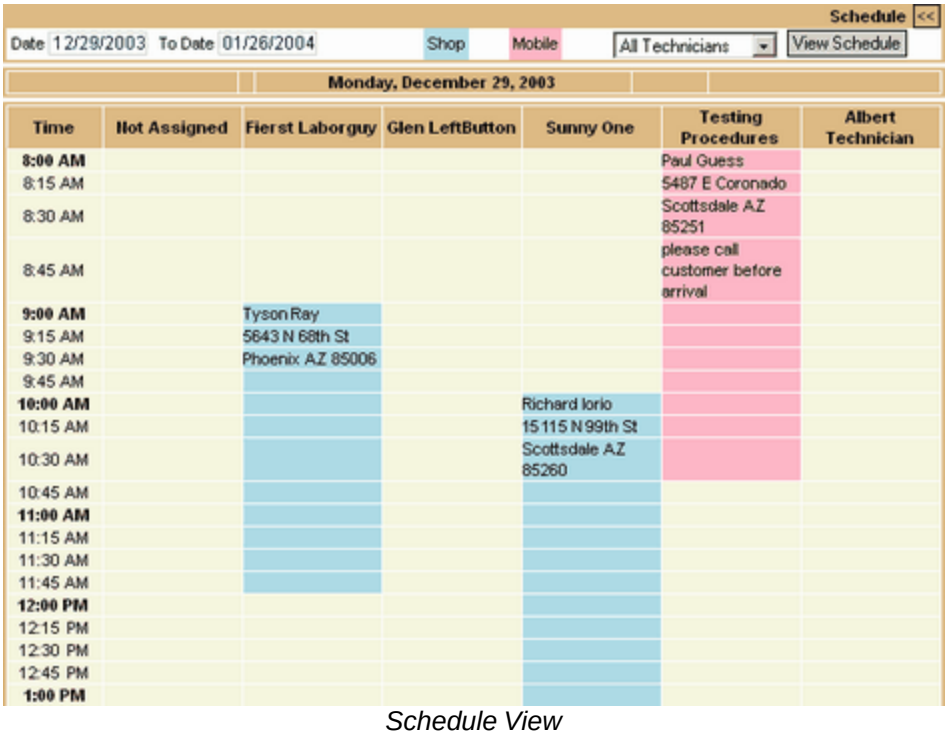


Schedule <<

Date 12/29/2003 To Date 01/26/2004 Shop Mobile All Technicians View Schedule

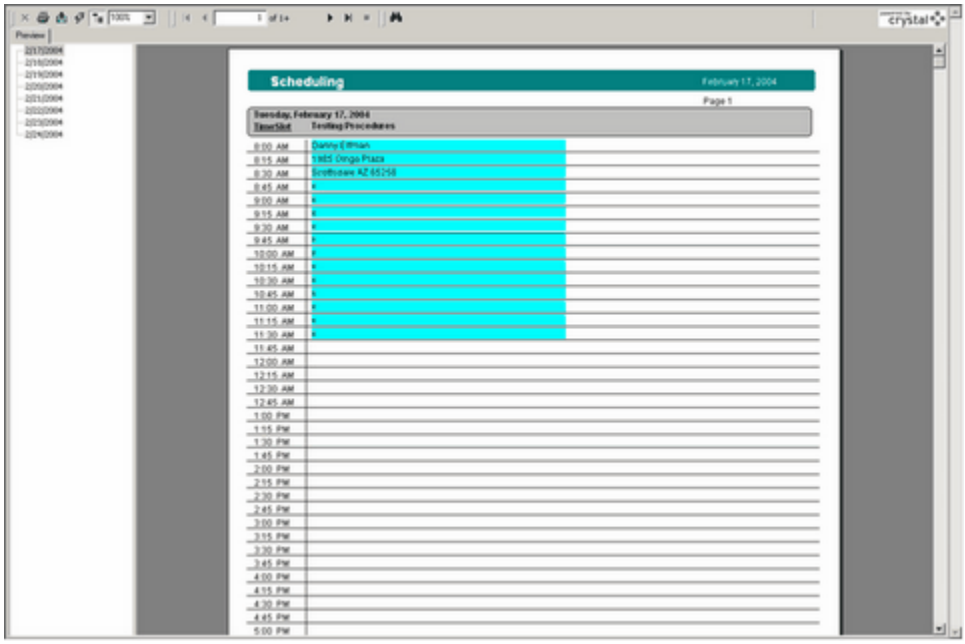
Monday, December 29, 2003

Time	Not Assigned	Fierst Laborguy	Glen LeftButton	Sunny One	Testing Procedures	Albert Technician
8:00 AM					Paul Guess	
8:15 AM					5487 E Coronado	
8:30 AM					Scottsdale AZ 85251	
8:45 AM					please call customer before arrival	
9:00 AM		Tyson Ray				
9:15 AM		5643 N 68th St				
9:30 AM		Phoenix AZ 85006				
9:45 AM						
10:00 AM				Richard Iorio		
10:15 AM				15115 N 99th St		
10:30 AM				Scottsdale AZ 85260		
10:45 AM						
11:00 AM						
11:15 AM						
11:30 AM						
11:45 AM						
12:00 PM						
12:15 PM						
12:30 PM						
12:45 PM						
1:00 PM						

Schedule View

4.5.2 Printing Schedule

1. You may also wish to print the schedule for a particular technician. To do this, choose the date range, select the technician's name from the drop down list and click on the Print Schedule button that will appear in the Sub Menu. This will open the printable schedule for that technician in another browser window.



Technician's Schedule Print View

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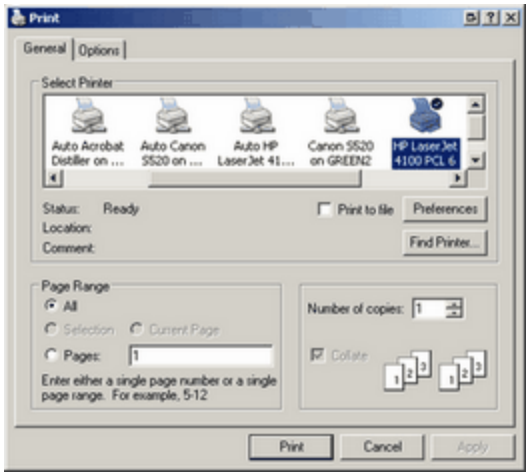
2. You may view the schedule on the screen by using the scroll bar on the right side of the screen or by clicking on the dates listed on the left side of the screen under the 'Preview' tab.
3. To print a copy of this schedule, click on the icon on the left side of the window just under the browser address window.
4. A print dialogue box will appear. Select the printer you wish to print to and click on the Print button.

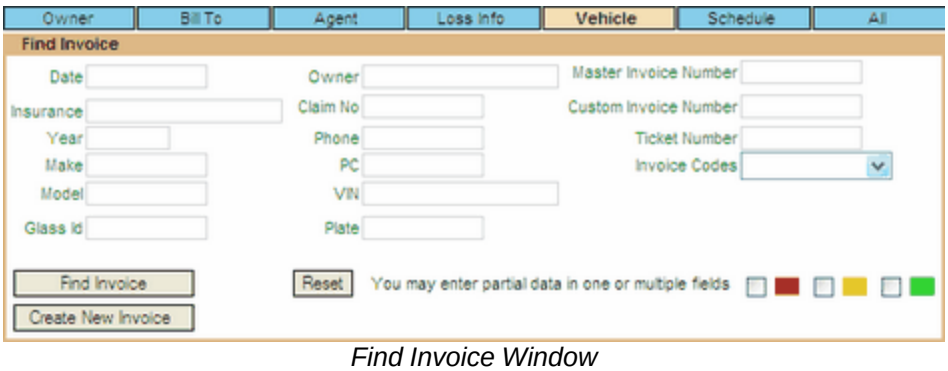


Print Dialogue Box

5. When you have finished printing, you may close that browser window.

4.6 Invoicing

Probably the most important module in eDirectGlass, Invoicing allows you to directly bill your business partners or clients. To work with the Invoicing module, click on the Invoicing button in the Quotes & Invoicing Sub Menu. The Find Invoice window will appear in the Work Area.



Find Invoice Window

4.6.1 Open an Invoice

To open and work with an Invoice:

1. Click on the Invoicing button in the Sub Menu to open the Find Invoice window.

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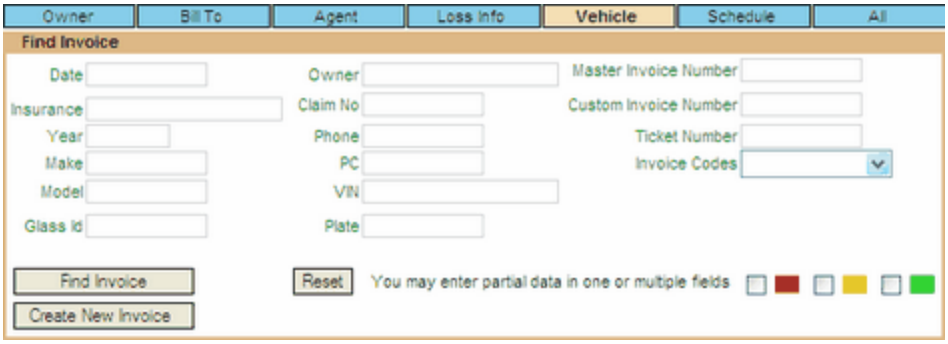
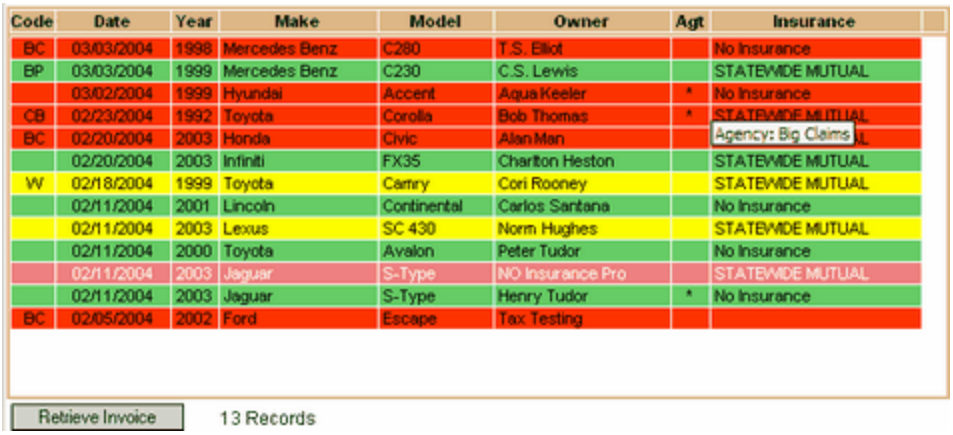


Find Invoice Window

2. In the Find Invoice window, enter the search information to locate the specific Invoice you wish to work with. To see all Invoices, just click on the Find Invoice button and the list of Invoices will display in the Work Area.


Code
Date
Year
Make
Model
Owner
Agt
Insurance
BC 03/03/2004 1998 Mercedes Benz C280 T.S. Elliot No Insurance
BP 03/03/2004 1999 Mercedes Benz C230 C.S. Lewis STATEWIDE MUTUAL
03/02/2004 1999 Hyundai Accent Aqua Keeler * No Insurance
CB 02/23/2004 1992 Toyota Corolla Bob Thomas * STATEWIDE MUTUAL
BC 02/20/2004 2003 Honda Civic Alan Man
Agency: Big Claims
02/20/2004 2003 Infiniti FX35 Charlton Heston STATEWIDE MUTUAL
W 02/18/2004 1999 Toyota Camry Cori Rooney STATEWIDE MUTUAL
02/11/2004 2001 Lincoln Continental Carlos Santana No Insurance
02/11/2004 2003 Lexus SC 430 Norm Hughes STATEWIDE MUTUAL
02/11/2004 2000 Toyota Avalon Peter Tudor No Insurance
02/11/2004 2003 Jaguar S-Type NO Insurance Pro STATEWIDE MUTUAL
02/11/2004 2003 Jaguar S-Type Henry Tudor * No Insurance
BC 02/05/2004 2002 Ford Escape Tax Testing
Retrieve Invoice
13 Records

Invoice List

3. Double-click on the Invoice you wish to open or single-click on an Invoice and click on the Retrieve Invoice button and the Invoice will open.

NOTE: Invoices that have a balance of $0 or have already been submitted to QuickBooks will not display in the full Find Invoice list. They will only display if you enter matching search criteria.

4.6.1.1 Invoice List Color Coding

The Invoice list is color coded for easy identification of items that require attention.

- Red - indicates Invoices that have not been submitted.
- Yellow - indicates Invoices that have a rejected status. If you hover your mouse over the Insurance column of a rejected invoice, you will be able to view the reject reason.
- Green - indicates Invoices that have been submitted and do not have a rejected status.

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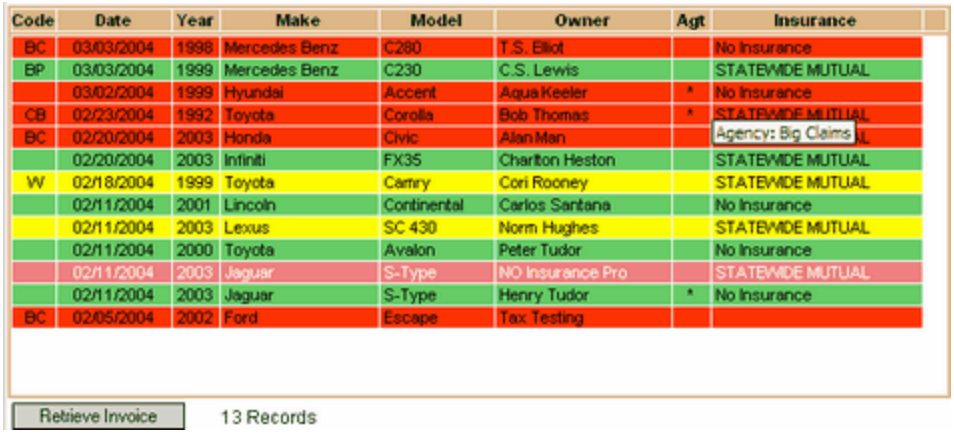


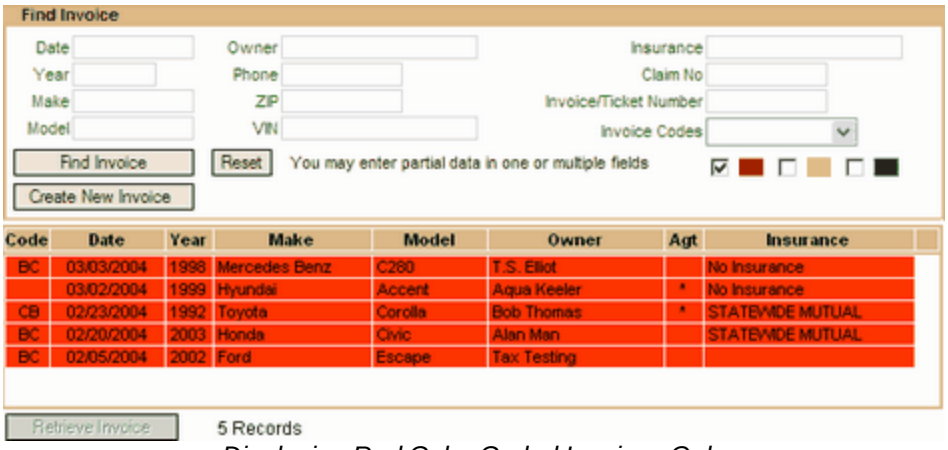
Code	Date	Year	Make	Model	Owner	Agt	Insurance
BC	03/03/2004	1998	Mercedes Benz	C280	T.S. Elliot		No Insurance
BP	03/03/2004	1999	Mercedes Benz	C230	C.S. Lewis		STATEWIDE MUTUAL
	03/02/2004	1999	Hyundai	Accent	Aqua Keeler	*	No Insurance
CB	02/23/2004	1992	Toyota	Corolla	Bob Thomas	*	STATEWIDE MUTUAL
BC	02/20/2004	2003	Honda	Civic	Alan Man		
	02/20/2004	2003	Infiniti	FX35	Charlton Heston		STATEWIDE MUTUAL
W	02/18/2004	1999	Toyota	Camry	Cori Rooney		STATEWIDE MUTUAL
	02/11/2004	2001	Lincoln	Continental	Carlos Santana		No Insurance
	02/11/2004	2003	Lexus	SC 430	Norm Hughes		STATEWIDE MUTUAL
	02/11/2004	2000	Toyota	Avalon	Peter Tudor		No Insurance
	02/11/2004	2003	Jaguar	S-Type	NO Insurance Pro		STATEWIDE MUTUAL
	02/11/2004	2003	Jaguar	S-Type	Henry Tudor	*	No Insurance
BC	02/05/2004	2002	Ford	Escape	Tax Testing		

Agency: Big Claims

Retrieve Invoice 13 Records

Invoice List

In the Find Invoice window, you may click on any combination of the color coding check boxes then clicking on the Find Invoice button to display only the invoices that meet those requirements (e.g., display only Invoices that have not been submitted).



Code	Date	Year	Make	Model	Owner	Agt	Insurance
BC	03/03/2004	1998	Mercedes Benz	C280	T.S. Elliot		No Insurance
	03/02/2004	1999	Hyundai	Accent	Aqua Keeler	*	No Insurance
CB	02/23/2004	1992	Toyota	Corolla	Bob Thomas	*	STATEWIDE MUTUAL
BC	02/20/2004	2003	Honda	Civic	Alan Man		STATEWIDE MUTUAL
BC	02/05/2004	2002	Ford	Escape	Tax Testing		

Displaying Red Color Coded Invoices Only

4.6.2 Using Invoice Codes

This section will discuss using and tracking the Invoice Codes you added during the eDirectGlass Administration set up. These codes will help you keep track of your outstanding Invoices and their status.

4.6.2.1 Applying Invoice Codes

The Vehicle tab is the screen where you will update the Invoice Code for this particular Invoice. Just select the appropriate Invoice Code from the drop down list and click on the Save button.

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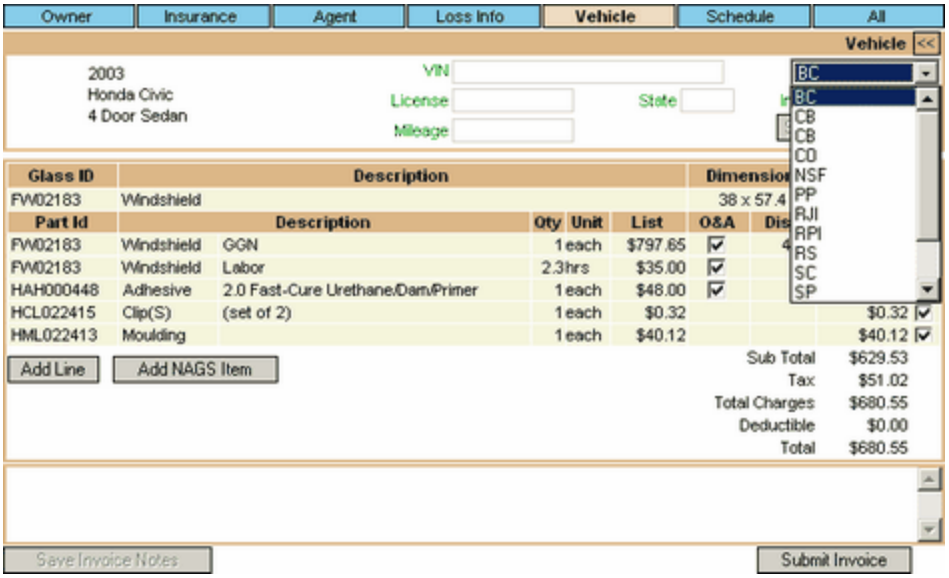
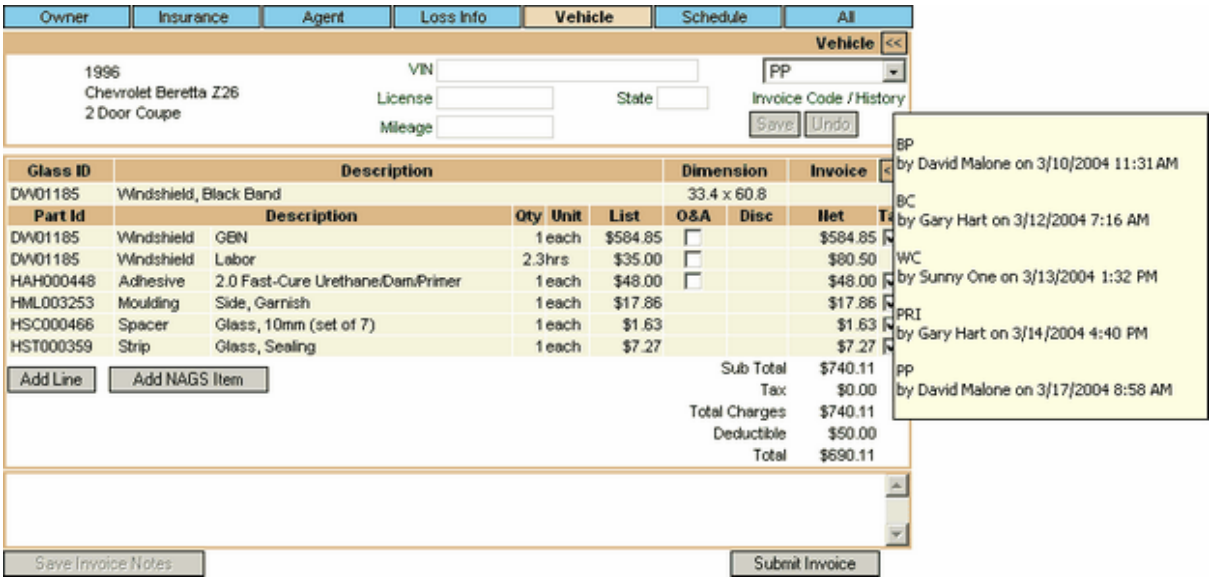


Invoice Codes Drop Down List

4.6.2.2 Invoice Code History View

You can also view the history of the Invoice Code changes by placing your mouse over the Invoice Code / History header to show the user name and date & time stamp of the Invoice Code change(s).



Invoice Code History View

4.6.3 Finalize an Invoice

Before you submit an Invoice for billing purposes, make sure that you make any necessary modifications, additions or deletions to the invoice.

Verify all of the information in the Owner, Insurance, Loss Info and Vehicle areas. Pay very close attention to line item details, pricing and taxes.

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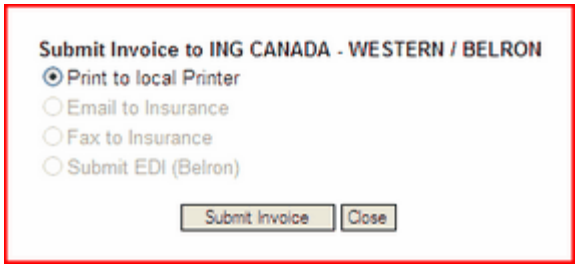
NOTE: If the Owner invoice carries a balance (for deductible and/or parts), you must enter a payment in the system before you are able to Submit and Print the invoice.

4.6.4 Submit an Invoice

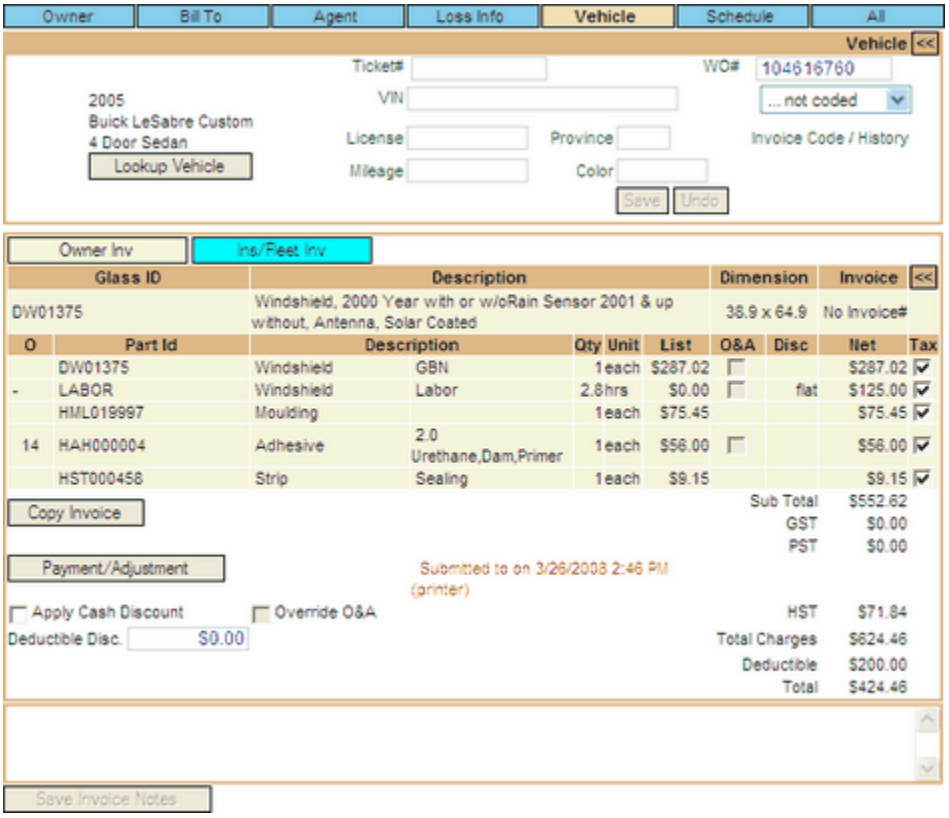
You will have the option to Submit your Invoice to your local printer for printing and mailing. You are only able to Submit and/or Print an invoice where the Owner balance is $0 (or if a Commercial Owner account, the balance must be $0 if COD or Terms must be selected on the Owner tab).



Invoice Submission Box

Once you have finalized the Invoice, click on the Submit Invoice button at the bottom of the Vehicle display. Select the method to submit the invoice and once again, click on the Submit Invoice button located in the method box. You will then be asked if you wish to Print the Invoice Now, click on the OK button and the Invoice Print Screen will display. If you do not wish to print the invoice at this time, simply click on the Cancel button. A date and time stamp will be listed in your record once you have submitted the invoice.

NOTE: *Once you submit an Invoice for billing, you cannot make changes to the Invoice.*



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Submitted Invoice Message

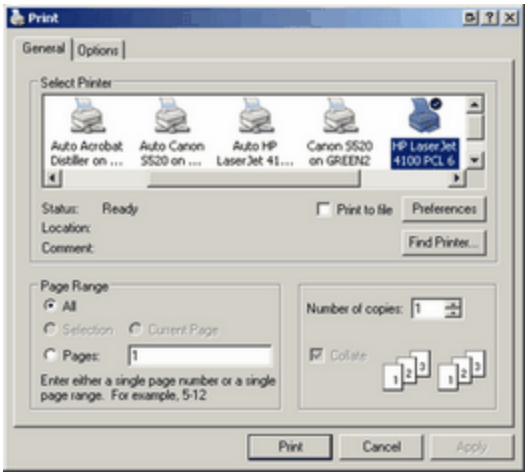
4.6.5 Print an Invoice

eDirectGlass allows you to print an Invoice only after submission (please make sure you have followed all of the steps under Section 1, *Getting Started* before you attempt to print any Invoices).

1. Select an Invoice from the Invoice List.
2. Click on the Print Invoice button.
3. The Invoice Print Preview screen will open in a new browser window.
4. Click on the button on the report viewer toolbar located under your browser window address bar.

Report Viewer Toolbar

5. A print dialogue box will appear. Select the printer you wish to print to and click on the Print button.



Print Dialogue Box

When you have finished printing, just close the report viewer browser window.

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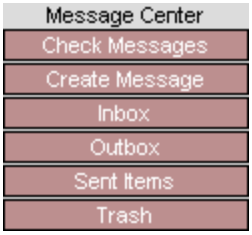
Part 5

5 Message Center

This chapter provides instructions for working with the eDirectGlass Message Center. The Message Center provides two-way communication with business partners (only with business partners who are using the eDirectGlass system) focused around the claim. Everything from inquires to exception requests can be made using this module.

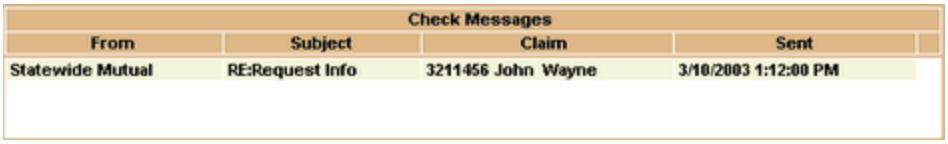
Clicking on the Message Center button on the Menu Bar displays the following Sub Menu:



Message Center Sub Menu

5.1 Check Messages

eDirectGlass automatically checks for new Messages every 10 minutes and will notify you if new mail arrives. A New Messages text will appear under your login name in the upper right hand corner of the screen when you have New Messages. At any time, you can click on the Check Messages button to check for and review new messages.



Check Messages Window

To review a new message, click on the message line and the message will open in the Work Area.

Review New Message Window

You can either Reply to this message now or simply continue to work elsewhere in eDirectGlass.

Once a new message has been reviewed, it is automatically moved to the Inbox.

5.2 Create Message

You may only create a message for an assignment that came down to your shop through eDirectGlass from an Insurance Company, Fleet Company or TPA using eDirectGlass. To create a new message, you have two options:

The first option requires you to open a New Assignment, Quote, Repair Order or Invoice. Once one of these is open, you can click on the Message Center button on the Menu Bar and then click on the

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Create Message button.

The second option also requires you to first open a New Assignment, Quote, Repair Order or Invoice. Once one of these items is open, you can click on the New Message button in the Sub Menu in the respective module Sub Menu.

Once you have clicked on the Create Message button or the New Message button, the Create New Message window displays in the Work Area.

Create New Message Box

The Claim, To, Cc and From fields cannot be changed. These fields are populated with the information from the specific item (Quote, Repair Order or Invoice) you have selected. In the Subject field, select the type of message you want to send. There are 6 Subjects to choose from: Request Info, Price Issue, Accepted Invoice, Rejected Invoice, Exception Request and Other.

In the message window, type the message you wish the recipient to read. When you are satisfied with your message, and you want to send it, click on the Send Message Now button and the message will be instantly sent. If you are interrupted or if you want to finish the message later, click on the Send Message Later button and the message will be moved to the Outbox where you can work with it at a later time.

If you do not want to send the message at all, click on the Cancel Message button.

5.3 Inbox

The Inbox contains all of your received messages. To review a message, simply click on the message line item. The message will display in the Work Area below the Inbox Message List.

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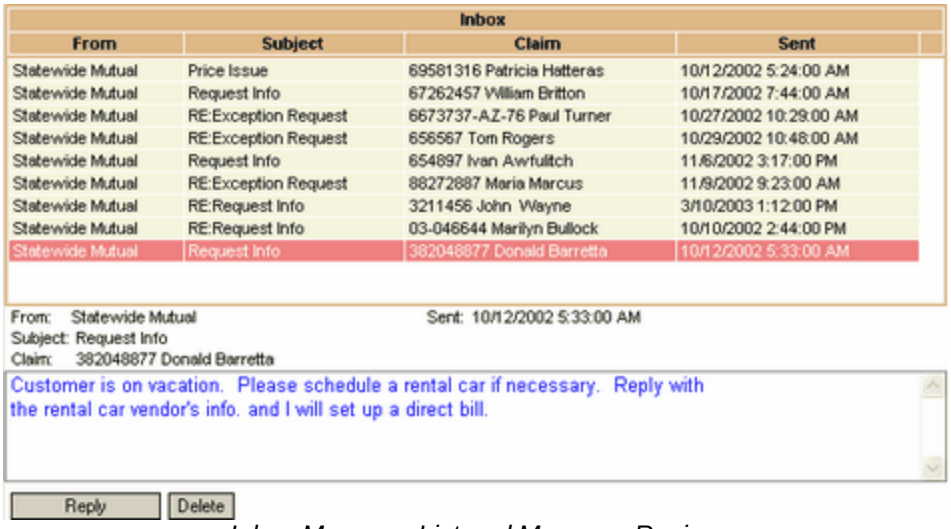

Inbox
From
Subject
Claim
Sent
Statewide Mutual Price Issue 69581316 Patricia Hatteras 10/12/2002 5:24:00 AM
Statewide Mutual Request Info 67262457 William Britton 10/17/2002 7:44:00 AM
Statewide Mutual RE:Exception Request 6673737-AZ-76 Paul Turner 10/27/2002 10:29:00 AM
Statewide Mutual RE:Exception Request 656567 Tom Rogers 10/29/2002 10:48:00 AM
Statewide Mutual Request Info 654897 Ivan Awfulitch 11/6/2002 3:17:00 PM
Statewide Mutual RE:Exception Request 88272887 Maria Marcus 11/9/2002 9:23:00 AM
Statewide Mutual RE:Request Info 3211456 John Wayne 3/10/2003 1:12:00 PM
Statewide Mutual RE:Request Info 03-046644 Marilyn Bullock 10/10/2002 2:44:00 PM
Statewide Mutual Request Info 382048877 Donald Barretta 10/12/2002 5:33:00 AM
From: Statewide Mutual
Sent: 10/12/2002 5:33:00 AM
Subject: Request Info
Claim: 382048877 Donald Barretta
Customer is on vacation. Please schedule a rental car if necessary. Reply with the rental car vendor's info. and I will set up a direct bill.
Reply
Delete

Inbox Message List and Message Review

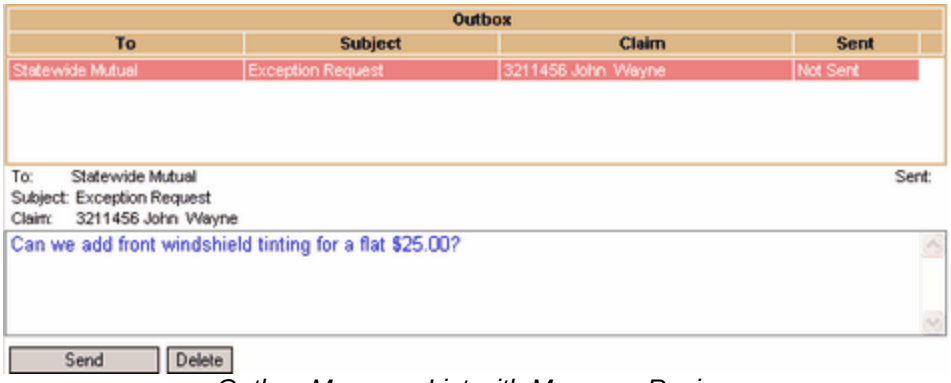
You can either Reply to this message now or simply continue to work elsewhere in eDirectGlass. When a claim is archived in eDirectGlass, the message(s) pertaining to that claim will disappear from the Inbox.

Messages can be sorted in any order by clicking on any one of the following tabs to sort by ascending or descending alphabetical or date range:

Inbox Message List Tab Sort Order

5.4 Outbox

The Outbox contains messages that were previously created but not sent. These messages are listed in the Outbox Message list. To complete or review one of these messages, simply click on the message and it will be displayed in the Work Area.



Outbox Message List with Message Review

When you are satisfied with your message and you want to send it, click on the Send button and the message will be instantly sent. You may also delete the message permanently by clicking on the Delete button. Otherwise, you may continue to work elsewhere in eDirectGlass.

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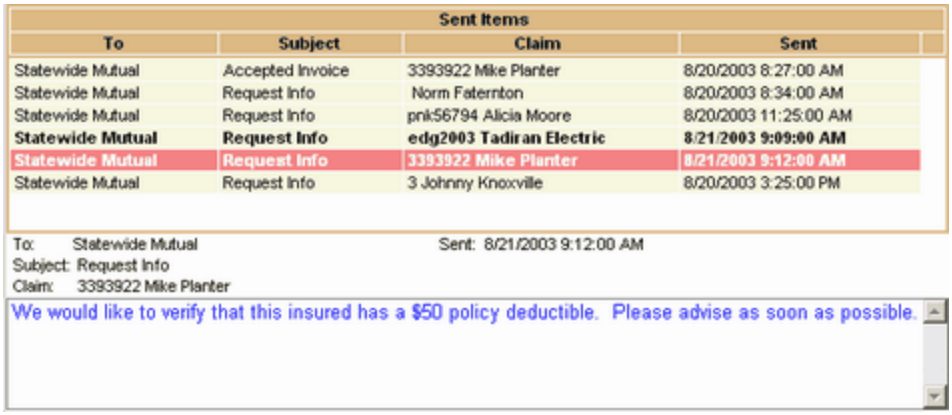
5.5 Sent Items

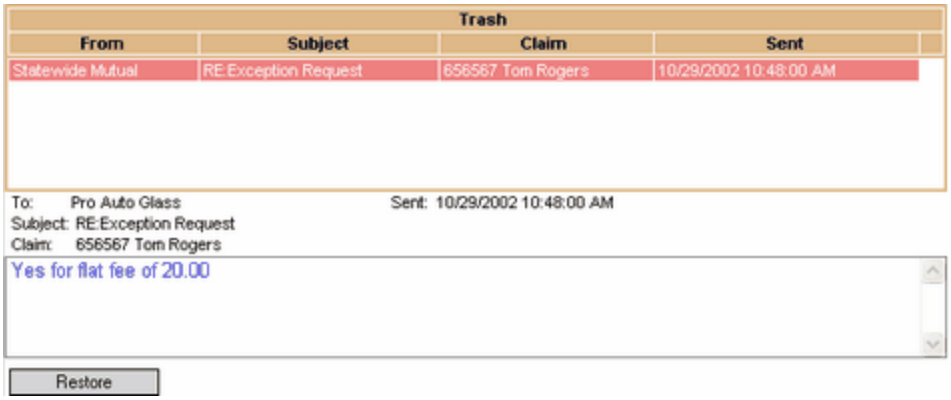
The Sent Items folder contains all of the messages that have been sent. Messages that belong to claims that have been archived will not be displayed. To review a sent message, click on the message line and it will display in the Work Area.


Sent Items
To
Subject
Claim
Sent
Statewide Mutual Accepted Invoice 3393922 Mike Planter 8/20/2003 8:27:00 AM
Statewide Mutual Request Info Norm Faternton 8/20/2003 8:34:00 AM
Statewide Mutual Request Info pnk56794 Alicia Moore 8/20/2003 11:25:00 AM
Statewide Mutual Request Info edg2003 Tadiran Electric 8/21/2003 9:09:00 AM
Statewide Mutual Request Info 3393922 Mike Planter 8/21/2003 9:12:00 AM
Statewide Mutual Request Info 3 Johnny Knoxville 8/20/2003 3:25:00 PM
To: Statewide Mutual
Sent: 8/21/2003 9:12:00 AM
Subject: Request Info
Claim: 3393922 Mike Planter
We would like to verify that this insured has a $50 policy deductible. Please advise as soon as possible.

Sent Items Review

5.6 Trash

The Trash folder contains messages that you have received and deleted. To review the items in the Trash, click on a message line and the message will open in the Work Area.



Trash Folder Message Review

You can restore any of the messages in the Trash folder. Open the message and click on the Restore button and the message will be moved to the Inbox.

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Part 6

6 C & V Relationship Mgmt

This chapter provides instructions for working with the eDirectGlass Customer & Vendor Relationship Management module. C&V Management allows you to work with Customer and Vendor contact information. Contact management allows you to keep detailed information on your business partners. eDirectGlass has enhanced contact management for the automotive glass industry. The C&V Relationship Management module is also where you enter and maintain the O&A Rules associated with the Insurance companies with whom you do business.

Clicking on the C&V Relationship Mgmt button on the Menu Bar displays the following Sub Menu:

C&V Relationship Mgmt Sub Menu

6.1 Owner Contact

The Owner section in C&V Relationship Management allows you to manage and store information about your customers that is above and beyond the information contained in Quotes and Invoices. An Owner Contact Record is automatically created in the eDirectGlass system when a claim is initiated by either creating a Quote or Accepting an Assignment.

6.1.1 Working with Owner Contacts

To work with an existing Owner contact, click on the Owner Contact button and the Find Existing Owner Contact window displays in the Work Area.

Enter the search information for the contact you are looking for and/or click the Find Existing Contact button to list all of the contacts in your database. When you locate the contact record you want to work with, you can either double-click it or single-click the line to highlight the record and select the Retrieve Contact button to open the contact record.

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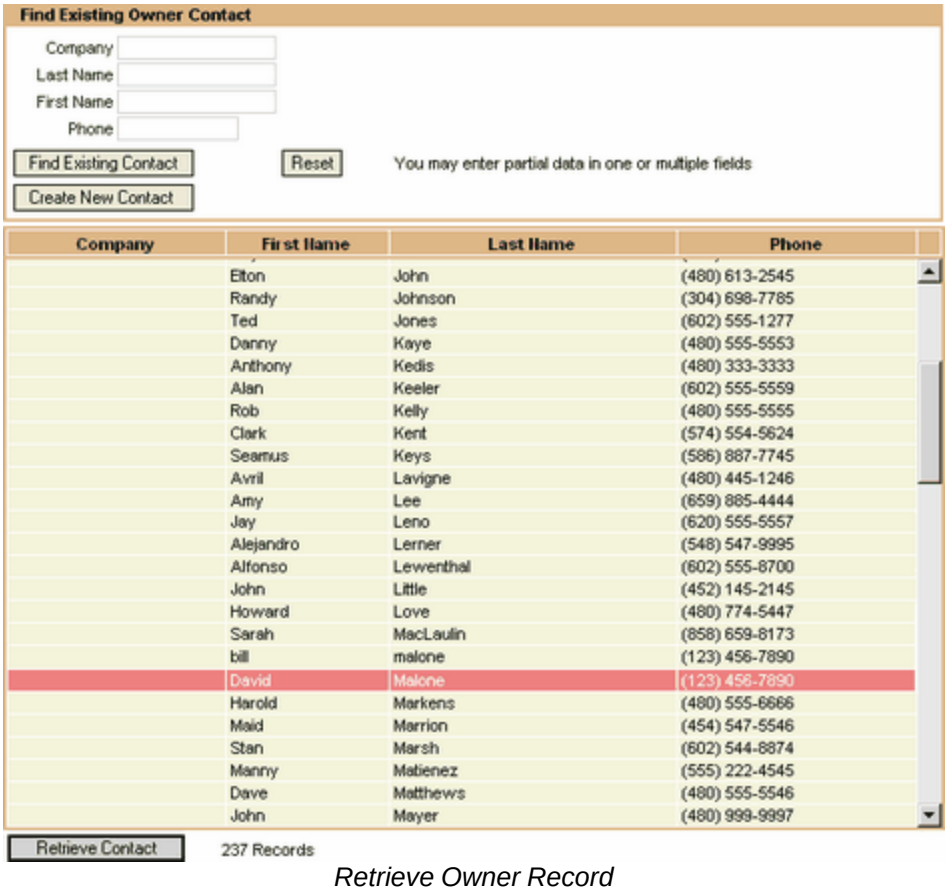

Retrieve Owner Record

You can also sort the entire list of contacts by clicking on any of the column headers after clicking on the Find Existing Contact button.

Owner Contact Column Headers - Sort Tabs

6.1.2 Maintaining the Owner Record

After you have selected the contact record and have retrieved it, the Owner Contact Record window will open in the Work Area.

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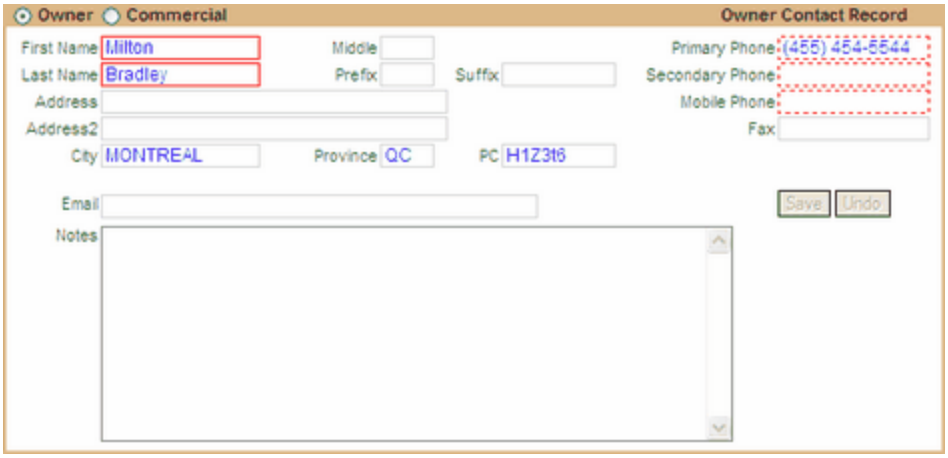


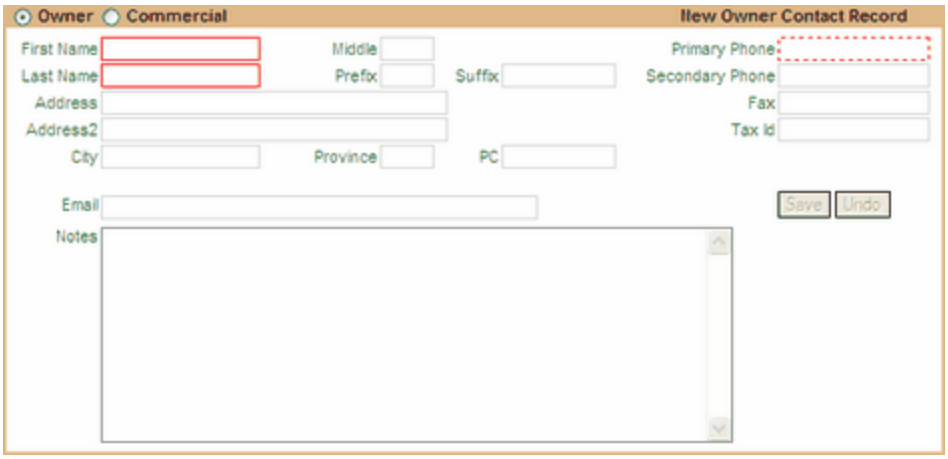
Owner Contact Record Window

You can edit any of the information in the contact record. In addition, you can also add Notes to the contact record. The Notes will not print anywhere, but they will display on the Owner panel if you have selected the Owner record from the Copy Account Feature. When you are finished making changes to the contact record, click on the Save button to save the modifications.

6.1.3 Creating a New Owner Contact

To create a New Owner Contact, click on either the Create New Contact button in the Find Existing Owner Contact window or click on the New Contact button in the Owner Contact Sub Menu.

After you click either button, a blank New Owner Contact Record window will display in the Work Area.



New Owner Contact Record

1. Enter all of the contact information. First and Last names are required, as indicated by the solid red boxes.
2. Enter at least one telephone number, as indicated by the dotted-line red boxes.
3. If you have any Notes, enter them in the Notes box.
4. Click on the Save button to save the modifications and new record.

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6.2 Insurance Contact

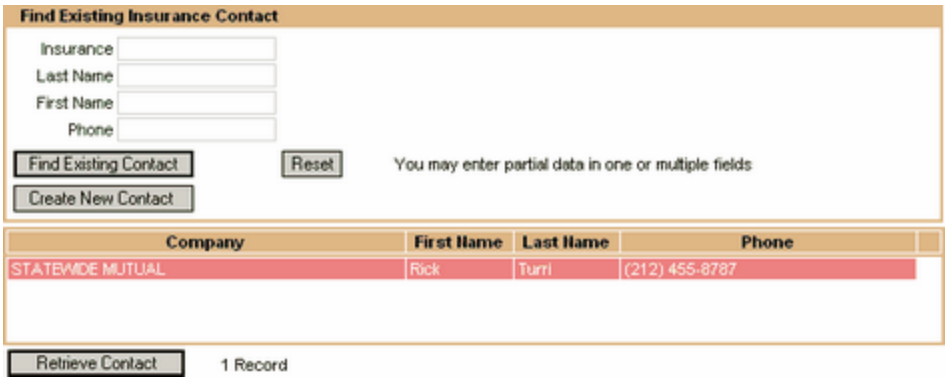
The Insurance section in C&V Relationship Management allows you to manage and store information about your business partners that is above and beyond the information contained in Quotes & Invoicing. This is also where you will add and maintain the O&A Rules associated with each of the insurance companies with whom you do business.

Note: ***You can only have one Insurance Contact Record in the eDirectGlass system per insurance company.***

6.2.1 Working with Insurance Contacts

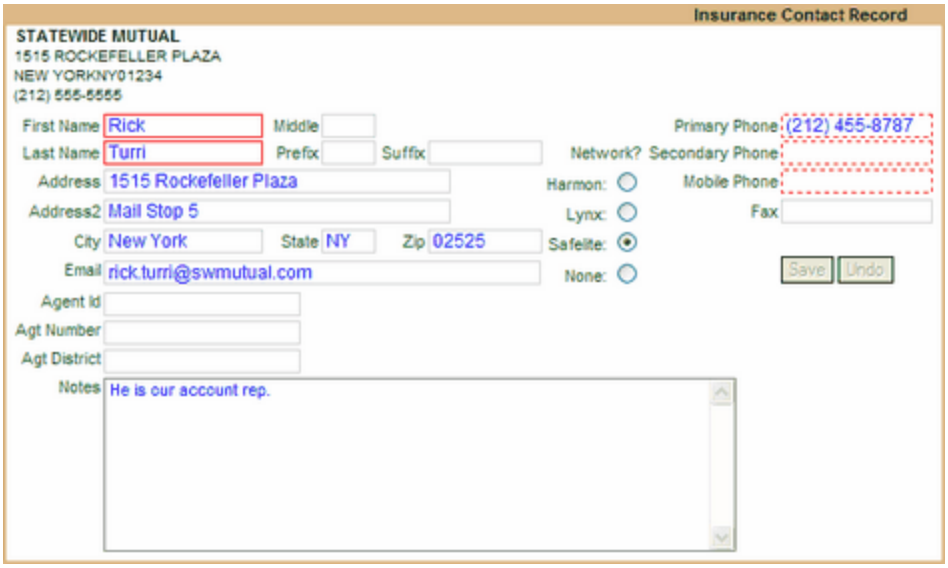
To work with an existing Insurance contact, click on the Insurance Contact button and the Find Existing Insurance Contact window displays in the Work Area.

Enter the search information for the contact you are looking for and click the Find Existing Contact button to list a narrowed search or just click the Find Existing Contact button to list all of the contacts in your database.



Find Existing Insurance Contact Window

When you locate the contact record you want to work with, you can either double-click it or single-click the line to highlight it and select the Retrieve Contact button to open the contact record.



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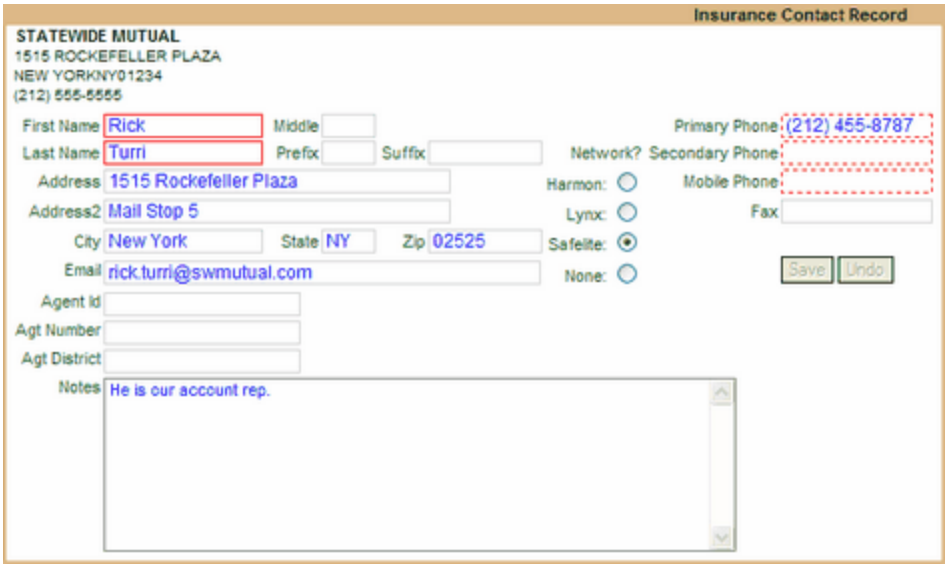
Insurance Contact Record

6.2.2 Maintaining the Insurance Record

After you have selected the contact record and have retrieved it, the Insurance Contact Record window will open in the Work Area.



Insurance Contact Record

You can edit any of the information in the contact record. In addition, you can also add Notes to the contact record. The Notes will not show up in any location other than in the C&V Relationship Management area. When you are finished making changes to the contact record, click on the Save button to save the modifications.

6.2.3 Creating a New Insurance Contact

To create a New Insurance Contact, click on either the Create New Contact button in the Find Existing Insurance Contact window or click on the New Contact button in the Insurance Contact Sub Menu.

Note: ***You can only have one Insurance Contact Record in the eDirectGlass system per insurance company.***

After you click either button, the Find Insurance Company window appears in the Work Area. Enter the Insurance company you wish to add a contact record for and click on the Find Insurance Company button. You must enter at least the first three letters of the Insurance company's name or the state in order to make the Find Insurance Company button active.

Once you have located the Insurance Company in the list, double-click the line or single-click the line and click the Select Insurance button to open the Add Insurance Contact Record screen.

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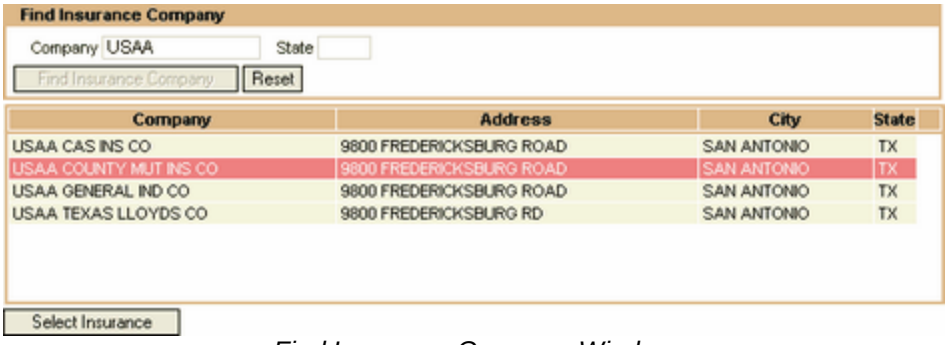
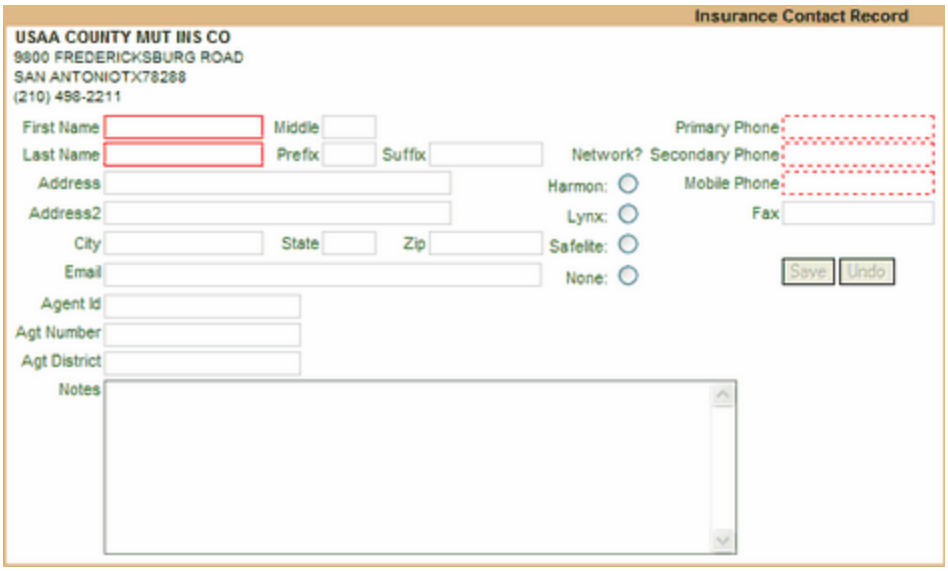


Find Insurance Company Window

A blank New Insurance Contact Record window will display in the Work Area.



New Insurance Contact Record

1. Enter all of the contact information. First and Last names are required, as indicated by the solid red boxes.
2. Enter at least one telephone number, as indicated by the dotted-line red boxes.
3. If you have any Notes, enter them in the Notes box.
4. Click on the Save button to save the modifications and new record.

6.2.4 Maintaining O&A Rules

The Insurance Contact Record is where you will set up and maintain your O&A Rules with each of the Insurance companies you do business with.

1. Once you have created the Insurance Contact Record and have it opened, click on either the Add Private O&A button or the Edit Private O&A button that appears in the Sub Menu to display the Private O&A CRM Profile Detail window in the Work Area.

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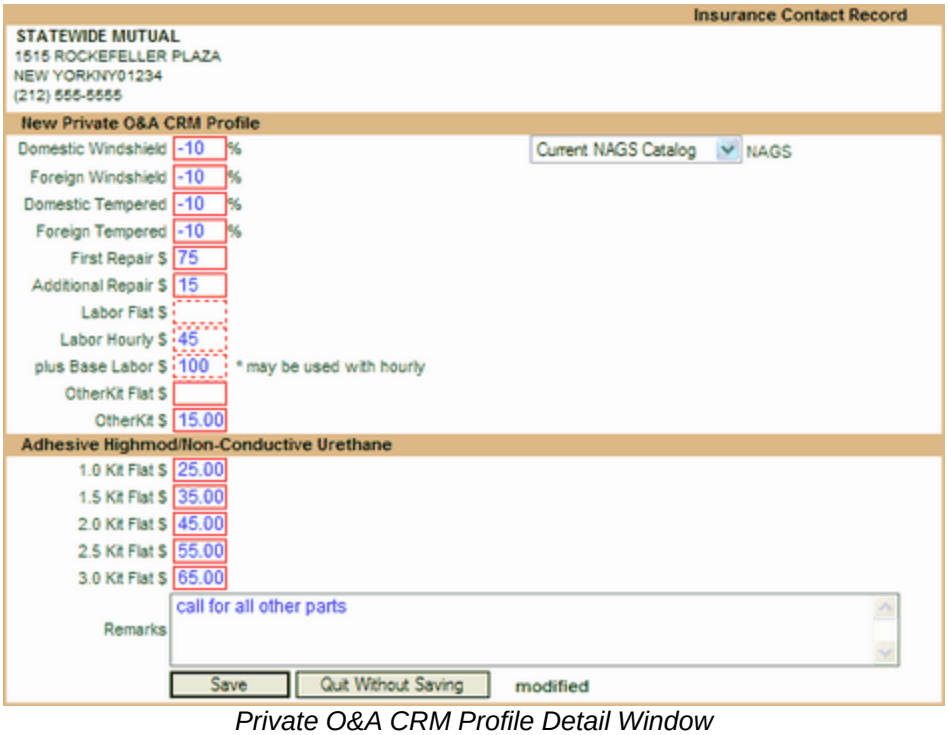
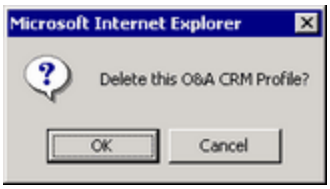


Private O&A CRM Profile Detail Window

2. When you have finished updating the record, click on the Save button to commit to your changes or click on the Quit Without Saving button to keep the rules as they were or if you were creating a new set of rules, to not save them at all.
3. You may also delete an existing set of private O&A Rules by clicking the Delete O&A CRM Profile button. You will be prompted by a dialogue box to confirm that you wish to delete the profile. Click on the OK button to delete.



Delete Profile Dialogue Box

NOTE: You can choose to use the Current NAGS Catalog or select another one from the drop down list depending on the insurance company's O & A Rules. If the insurance company is using a percentage above NAGS, you will need to show that as a negative (-) percentage (i.e, 10% above NAGS will need to be entered as -10). Kit pricing is either a flat fee or by quantity. If the insurance company is using flat enter it in the OtherKit Flat field, otherwise enter the amount in the OtherKit field.

6.3 Agent Contact

The Agent section in C&V Relationship Management allows you to manage and store information about your referral agents. You will enter in one contact record for the referral location (e.g., Car Wash location) and associated records for each of the agents at that location.

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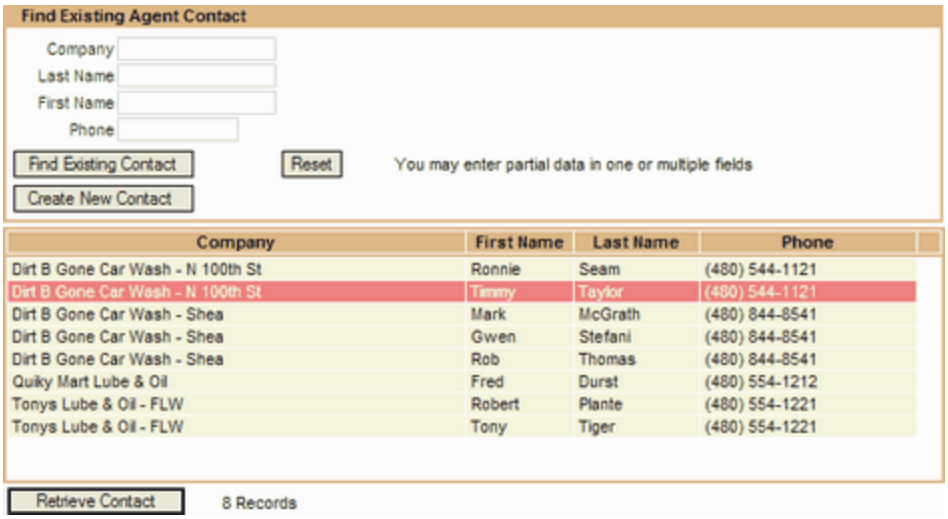
6.3.1 Working with Agent Record

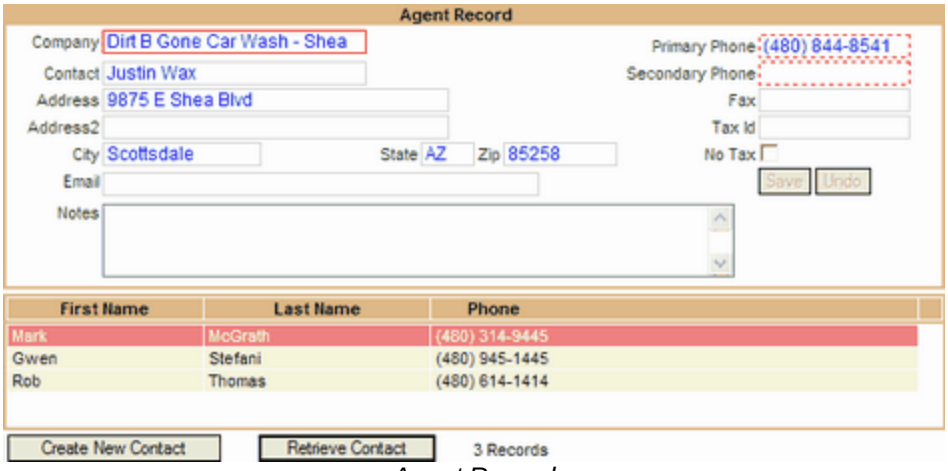
To work with an existing Agent contact, click on the Agent Contact button and the Find Existing Agent Contact window displays in the Work Area.

Enter the search information for the contact you are looking for and click the Find Existing Contact button to list a narrowed search or just click the Find Existing Contact button to list all of the contacts in your database.



Find Existing Agent Contact Window

When you locate the agent record you want to work with, you can either double-click it or single-click and select the Retrieve Contact button to open the contact record.



Agent Record

You can also make changes/updates to the individual Agent Contacts from this screen by either double-clicking on the line or single-clicking the contact and clicking on the Retrieve Contact button to open the Agent Contact Record in the Work Area.

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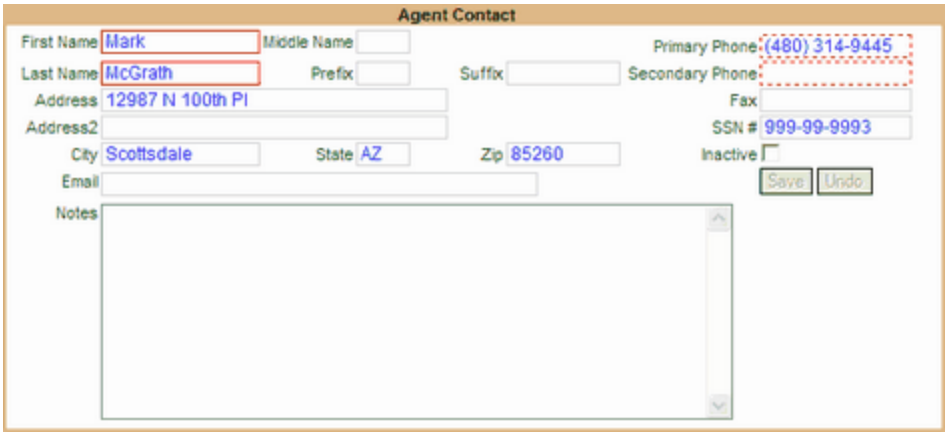
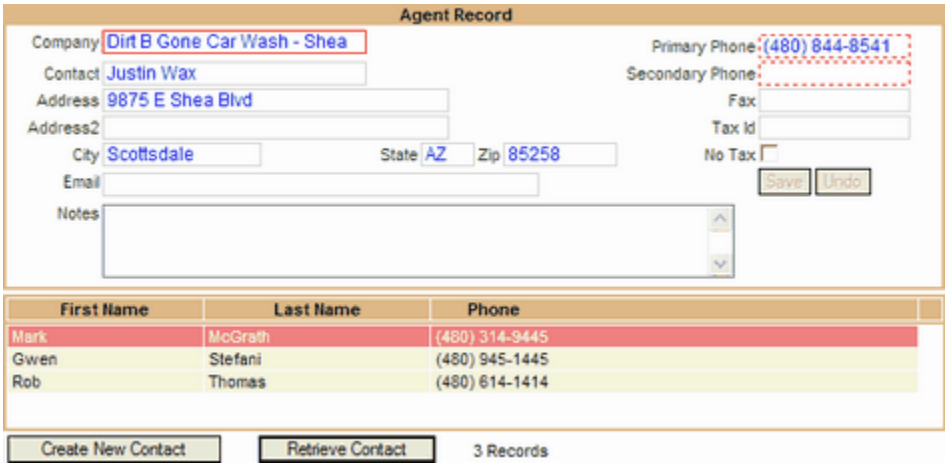


Agent Contact Record

6.3.2 Maintaining the Agent Record

After you have selected the contact record and have retrieved it, the Agent Record window will open in the Work Area.



Agent Record

You can edit any of the information in the contact record. In addition, you can also add Notes to the contact record. The Notes will not show up in any location other than in the C&V Relationship Management area. When you are finished making changes to the contact record, click on the Save button to save the modifications.

6.3.3 Creating a New Agent Record

To create a New Agent Contact, click on either the Create New Contact button in the Find Existing Agent Contact window or click on the New Agent button in the Agent Contact Sub Menu. A blank New Agent Record window will display in the Work Area.

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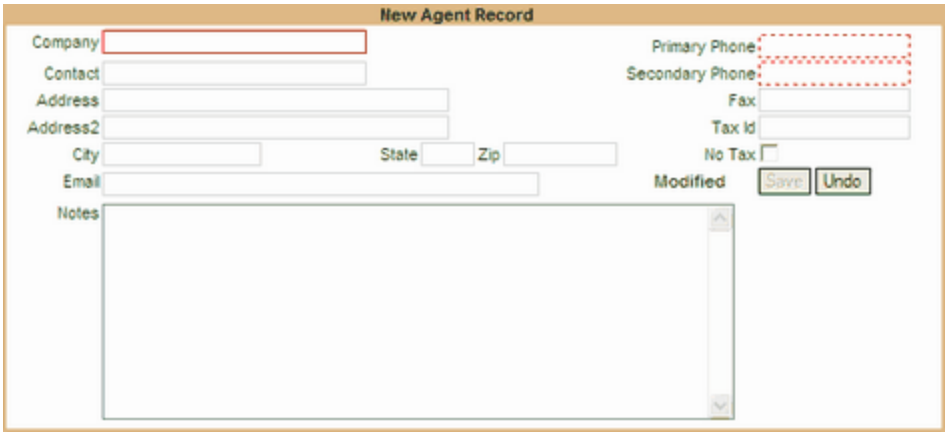
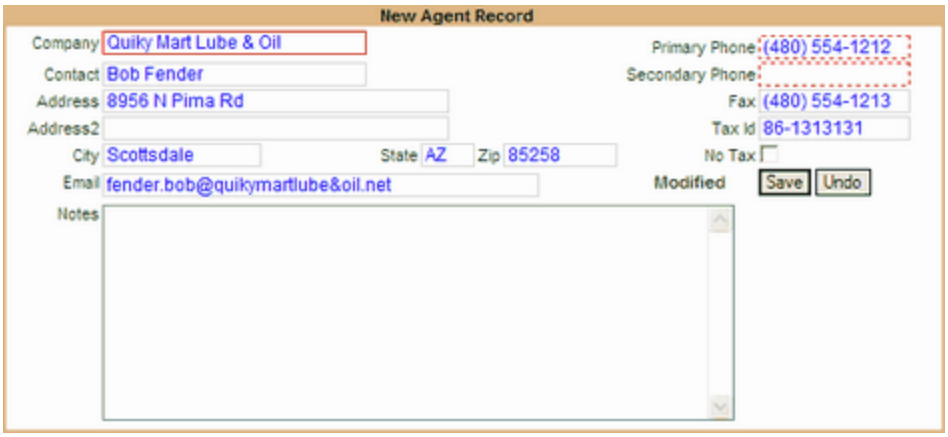


New Agent Record Window

1. Enter all of the information for the agent location (you will add each of the referral agents at a later time). Company Name is required, as indicated by the solid red box. You may add a main contact under this record, but if this person is a referral agent, you will also need to enter that person as a contact for this record.
2. Enter at least one telephone number, as indicated by the dotted-line red boxes.
3. If you have any Notes, enter them in the Notes box.
4. Click on the Save button to save the modifications and new record.



Completed New Agent Record Window

6.3.4 Adding Agent Contacts

Once you have added the main Agent Record, you must now enter in all of your referral agents for tracking purposes (i.e., if you are required to send the referral agents 1099's at year's end).

1. Click on the Agent Contact button to display the Find Existing Agent Contact window in the Work Area.
2. Click on the Find Existing Contact button to display a list of all of your existing Agent Records. **Note:** If you have already entered referral agents for a main contact, they will be listed as separate lines, but they are all part of the main contact record.

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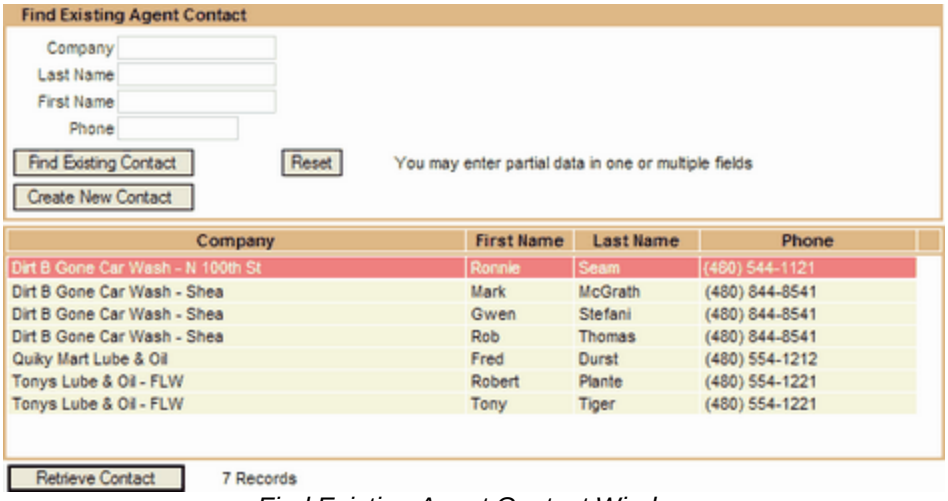
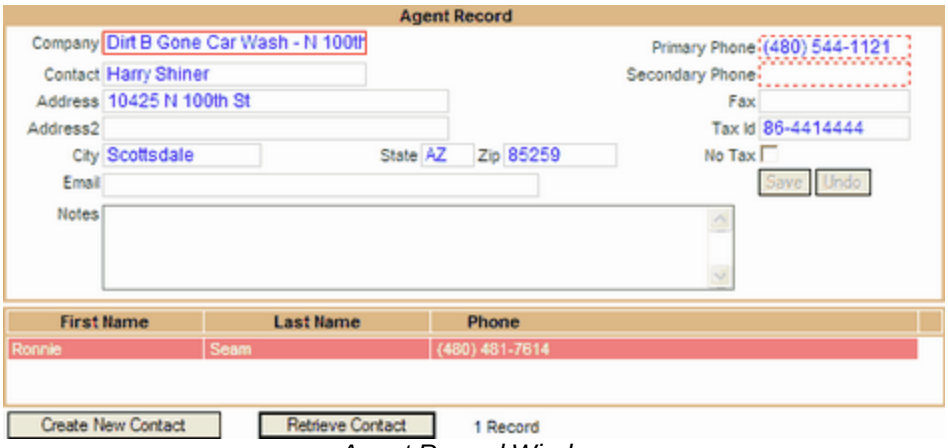


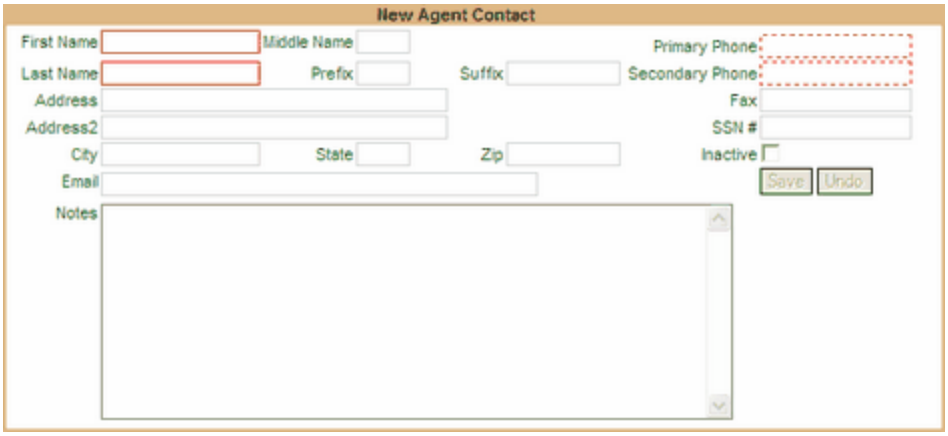
Find Existing Agent Contact Window

3. You may select the record you wish to add an agent to by either double-clicking the line or single-clicking the line and then clicking on the Retrieve Contact button to display the existing main Agent Record window in the Work Area.



Agent Record Window

4. To add an additional Agent Contact to this record, click on the Create New Contact button to open the New Agent Contact window in the Work Area.



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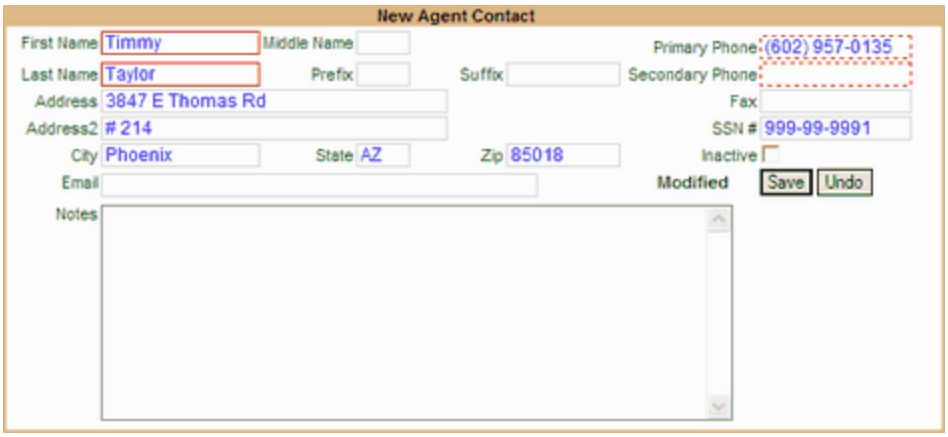
New Agent Contact Window

5. When you have finished entering the necessary information, click on the Save button to add this Agent Contact to the Agent Record.



Completed New Agent Contact Window

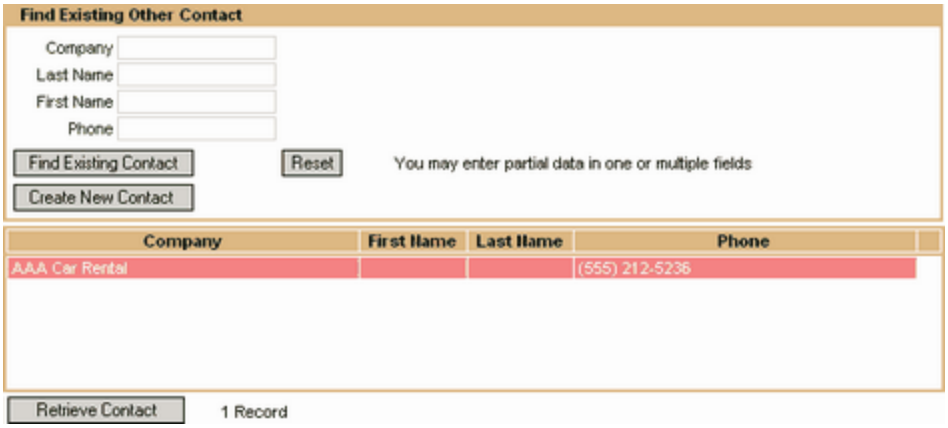
6.4 Other Contact

The Other section in C&V Relationship Management allows you to manage and store information about businesses that offer services such as telephone, supplies, rental car, etc., to your company.

6.4.1 Working with Other Contacts

To work with an existing Other Contact, click on the Other Contact button and the Find Existing Other Contact window will display in the Work Area.

Enter the search information for the contact you are looking for and/or click the Find Existing Contact button to list all of the contacts in your database. When you locate the contact record you want to work with, you can either double-click it or single-click and select the Retrieve Contact button to open the contact record.



Retrieve Other Contact Record

6.4.2 Maintaining the Other Contact Record

After you have selected the contact record and have retrieved it, the Other Contact Record window will open in the Work Area.

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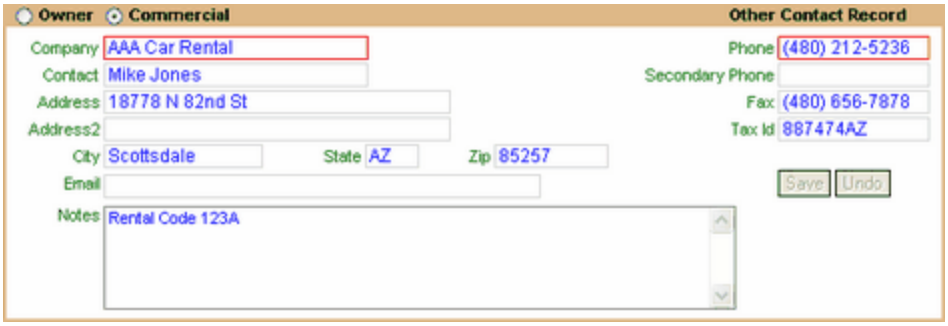


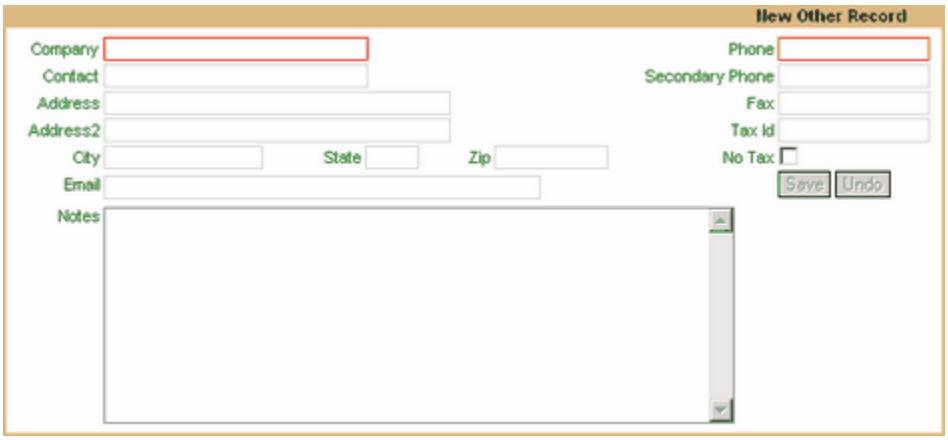
Other Contact Record Window

You can edit any of the information in the contact record. In addition, you can also add Notes to the contact record. The Notes will not show up in any location other than in the C&V Relationship Management area. When you are finished making changes to the contact record, click on the Save button to save the modifications.

6.4.3 Creating a New Other Contact

To create a New Other Contact, click on either the Create New Contact button in the Find Existing Other Contact window or click on the New Contact button in the Other Contact Sub Menu.

After you click either button, a blank New Other Contact Record window will display in the Work Area.



New Other Contact Record

1. Enter all of the contact information. Commercial Records require the Company Name.
2. Enter at least one telephone number, as indicated by the dotted-line red boxes.
3. If you have any Notes, enter them in the Notes box.
4. Click on the Save button to save the modifications and new record.

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Part 7

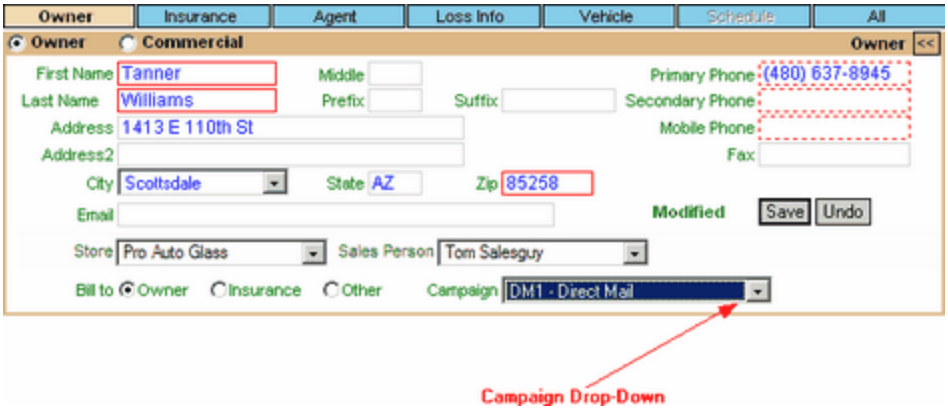
7 Marketing

This chapter provides instructions for working with the eDirectGlass Marketing module. The Market module allows you to create and manage marketing campaigns. Once marketing campaigns are established, you can use them when creating new quotes so that you can track the return for each marketing campaign your company is participating in such as Yellow Pages, Radio, TV, etc.

Clicking on the Marketing button on the Menu Bar displays the following Sub Menu:

Marketing Sub Menu

The Marketing module is very easy to implement and use. After you have created the necessary Marketing Campaigns, you can begin tracking your Marketing efforts. In a Quote, Repair Order or Invoice, all you have to do is click on the **Owner** button in the Task Menu as you are working in a claim. In the Owner box, click on the drop down box next to Campaign and choose the appropriate Campaign as it relates to the claim. Remember to click on the Save button after you choose a Campaign.



7.1 Owner Marketing

Owner Marketing allows you to create and manage marketing campaigns related to walk-in or referral business.

7.1.1 Working with Owner Marketing

To work with an existing Marketing Campaign, click on the Owner Marketing button and the Find Campaign (Owner Marketing) window displays in the Work Area.

Enter the search information for the Campaign you are looking for and/or click the Find Existing Campaign button to list all of the Marketing Campaigns in your database. When you locate the Campaign you want to work with, you can either double-click it or single-click and select the Retrieve Campaign button to open the Campaign record.

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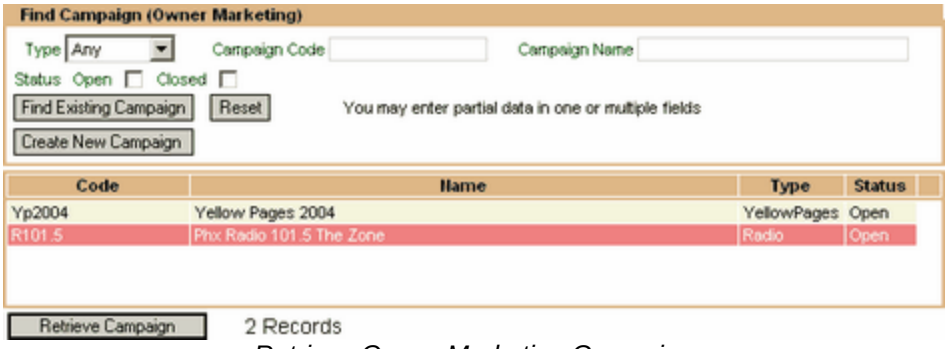


Retrieve Owner Marketing Campaign

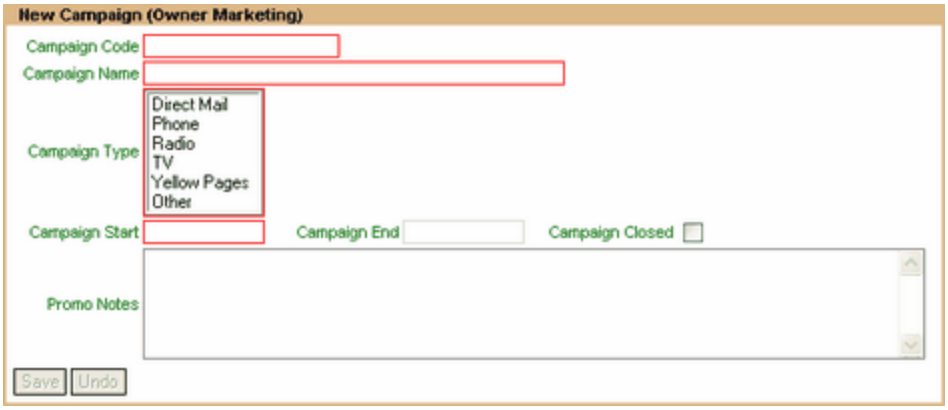
After you retrieve the campaign record, the Edit Campaign (Owner Marketing) window will display in the Work Area. Make any modifications to the Campaign and when you are finished, click on the Save button.

Edit Campaign (Owner Marketing) Window

7.1.2 Creating a New Campaign

To create a New Owner Campaign, click on either the Create New Campaign button in the Find Campaign (Owner Marketing) window or click on the New Campaign button in the Owner Marketing Sub Menu.

After you click either button, a blank New Campaign (Owner Marketing) window will display in the Work Area.



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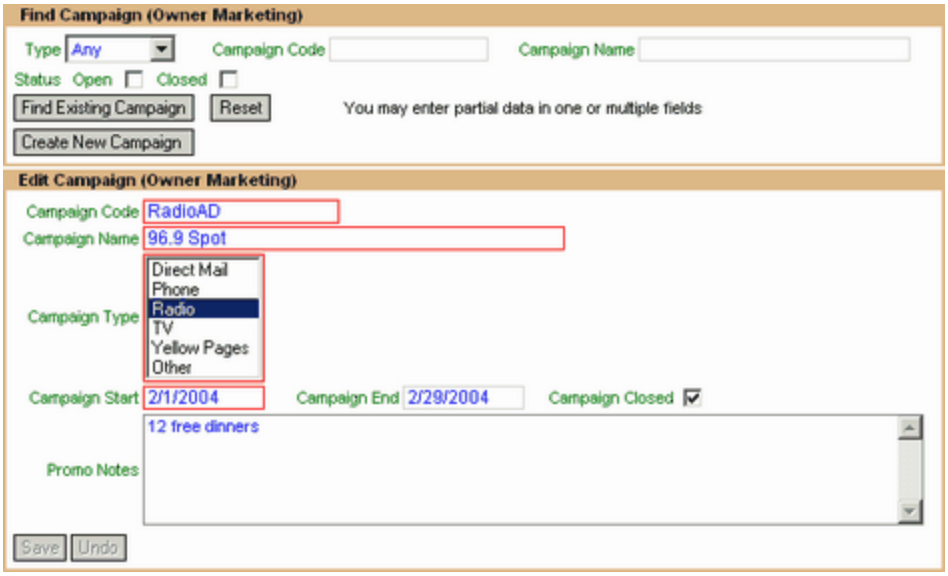
New Campaign (Owner Marketing) Window

1. Enter a Campaign Code. This code will be used for identifying campaigns for reporting purposes.
2. Enter a Campaign Name that will be associated to the Campaign Code. This name should be short yet descriptive.
3. Select a Campaign Type. If you select 'Other' please fill in a description in the box that will appear.
4. Select a Campaign Start and End date.
5. Enter Promo Notes. Use this area to note, in as much detail as you wish, the description of the Marketing Campaign.
6. Click on the Save button to save the New Campaign.

7.1.3 Close an Owner Campaign

When your Campaign time period is over or at anytime during a Campaign, you can close the Campaign so it is no longer displayed in the Quotes & Invoicing module.

To close a Campaign, find the Campaign you wish to close by clicking on the Find Existing Campaign button in the Find Campaign (Owner Marketing) window. In the Edit Campaign (Owner Marketing) window, click on the Campaign Closed ☑ check box and click on the Save button to close the Campaign.



Edit Campaign (Owner Marketing) Window - Closed Campaign

You may also close a campaign by highlighting the campaign line in the Find Campaign (Owner Marketing) listing and clicking on the Close Campaign button in the Sub Menu.

NOTE: Once a Campaign is closed, it cannot be reopened.

7.2 Agent Marketing

Agent Marketing allows you to create and manage marketing campaigns related to working with Agency's or Third-Party Administrators.

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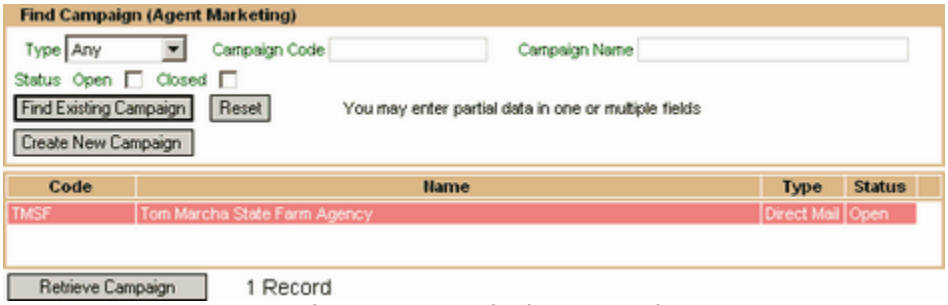
7.2.1 Working with Agent Marketing

To work with an existing Agent Marketing Campaign, click on the Agent Marketing button and the Find Campaign (Agent Marketing) window will display in the Work Area.

Enter the search information for the Campaign you are looking for and/or click the Find Existing Campaign button to list all of the Agent Campaigns in your database. When you locate the Campaign you want to work with, you can either double-click it or single-click and select the Retrieve Campaign button to open the Campaign record.



Retrieve Agent Marketing Campaign

After you retrieve the campaign record, the Edit Campaign (Agent Marketing) window will display in the Work Area. Make any modifications to the Campaign and when you are finished, click on the Save button.

New Campaign (Agent Marketing)
Campaign Code TMSF
Campaign Name Tom Marcha State Farm Agency
Campaign Type
Direct Mail
Phone
Appt
Other
Campaign Start 01/01/2004
Campaign End 09/30/2004
Campaign Closed
Promo Notes
For all referrals that we receive from this agency, we will discount the job in the form of a rebate to the Agency in the amount of $25 per referral.
Save
Undo
Modified

Edit Campaign (Agent Marketing) Window

7.2.2 Creating an Agent Campaign

To create a New Agent Campaign, click on either the Create New Campaign button in the Find Campaign Lookup Screen or click on the New Campaign button in the Agent Marketing Sub Menu.

After you click either button, a blank New Campaign (Agent Marketing) window will display in the Work Area.

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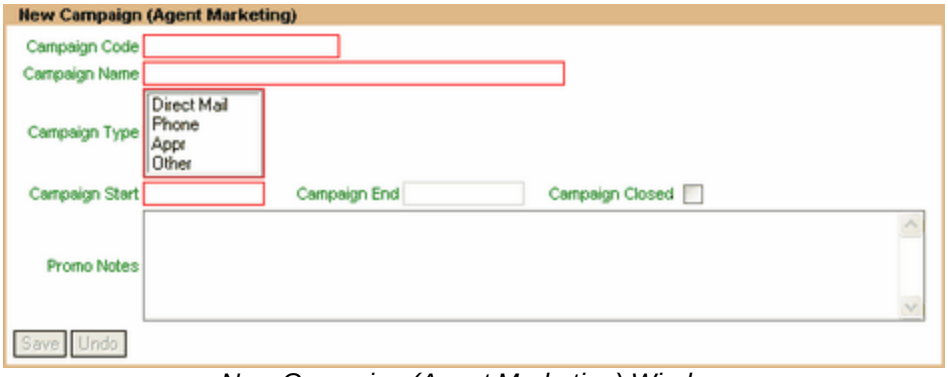


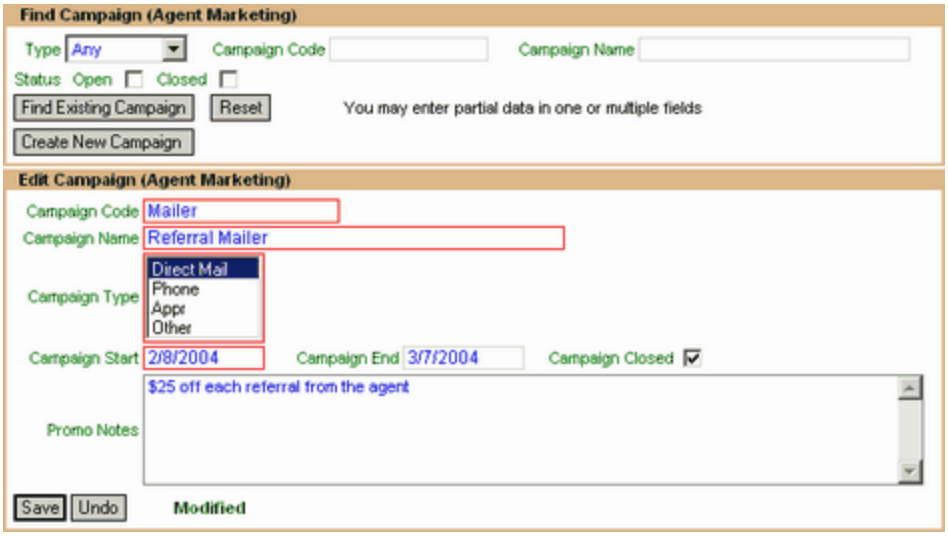
New Campaign (Agent Marketing) Window

1. Enter a Campaign Code. This code will be used for identifying campaigns for reporting purposes.
2. Enter a Campaign Name that will be associated to the Campaign Code. This name should be short yet descriptive.
3. Select a Campaign Type. If you select 'Other' please fill in a description in the box that will appear.
4. Select a Campaign Start and End date.
5. Enter Promo Notes. Use this area to note, in as much detail as you wish, the description of the Marketing Campaign.
6. Click on the Save button to save the New Campaign.

7.2.3 Close an Agent Campaign

When your Campaign time period is over or at anytime during a Campaign, you can close the Campaign so it is no longer displayed in the Quotes & Invoicing module.

To close a Campaign, find the Campaign you wish to close by clicking on the Find Existing Campaign button in the Find Campaign (Agent Marketing) window. In the Edit Campaign (Agent Marketing) window, click on the Campaign Closed ☑ check box and click on the Save button to close the Campaign.



Edit Campaign (Agent Marketing) Window - Closed Campaign

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You may also close a campaign by highlighting the campaign line in the Find Campaign (Agent Marketing) listing and clicking on the Close Campaign button in the Sub Menu.

NOTE: Once a Campaign is closed, it cannot be reopened.

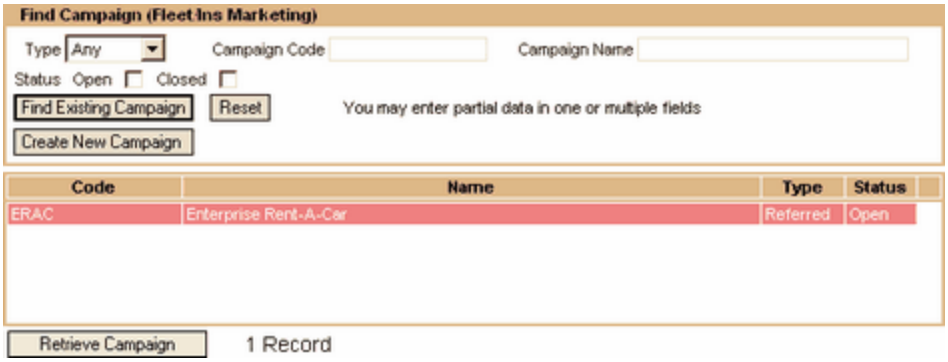
7.3 Fleet/Ins Marketing

Fleet/Ins Marketing allows you to create and manage marketing campaigns related to working with Fleet or Insurance companies.

7.3.1 Working with Fleet/Ins Marketing

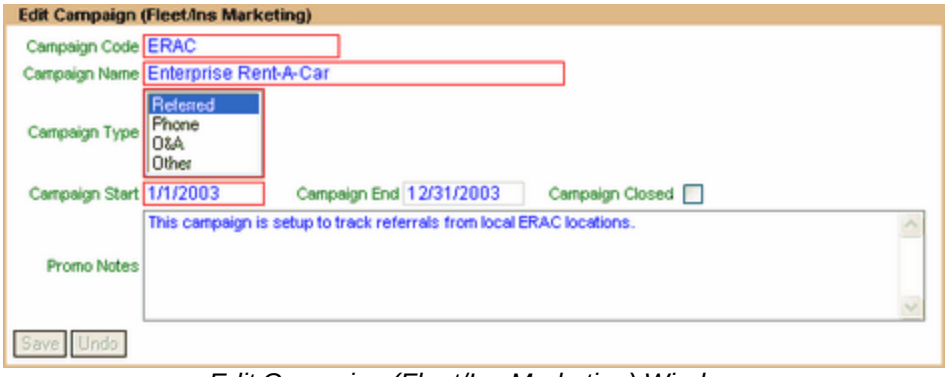
To work with an existing Marketing Campaign, click on the Fleet/Ins Marketing button and the Find Campaign (Fleet/Ins Marketing) window displays in the Work Area.

Enter the search information for the Campaign you are looking for and/or click the Find Existing Campaign button to list all of the Fleet/Insurance Campaigns in your database. When you locate the Campaign you want to work with, you can either double-click it or single-click and select the Retrieve Campaign button to open the Campaign record.



Retrieve Fleet/Ins Marketing Campaign

After you retrieve the campaign record, the Edit Campaign (Fleet/Ins Marketing) window will display in the Work Area. Make any modifications to the Campaign and when you are finished, click on the Save button.



Edit Campaign (Fleet/Ins Marketing) Window

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7.3.2 Creating a Fleet/Ins Campaign

To create a New Fleet/Ins Campaign, click on either the Create New Campaign button in the Find Campaign (Fleet/Ins Marketing) window or click on the New Campaign button in the Fleet/Ins Marketing Sub Menu.

After you click either button, a blank New Campaign (Fleet/Ins Marketing) window will display in the Work Area.

New Campaign (Fleet/Ins Marketing) Window

1. Enter a Campaign Code. This code will be used for identifying campaigns for reporting purposes.
2. Enter a Campaign Name that will be associated to the Campaign Code. This name should be short yet descriptive.
3. Select a Campaign Type. If you select 'Other' please fill in a description in the box that will appear.
4. Select a Campaign Start and End date.
5. Enter Promo Notes. Use this area to note, in as much detail as you wish, the description of the Marketing Campaign.
6. Click on the Save button to save the New Campaign.

7.3.3 Close a Fleet/Ins Marketing Campaign

When your Campaign time period is over or at anytime during a Campaign, you can close the Campaign so it is no longer displayed in the Quotes & Invoicing module.

To close a Campaign, find the Campaign you wish to close by clicking on the Find Existing Campaign button in the Find Campaign (Fleet/Ins Marketing) window. In the Edit Campaign (Fleet/Ins Marketing) window, click on the Campaign Closed ☑ check box and click on the Save button to close the Campaign.

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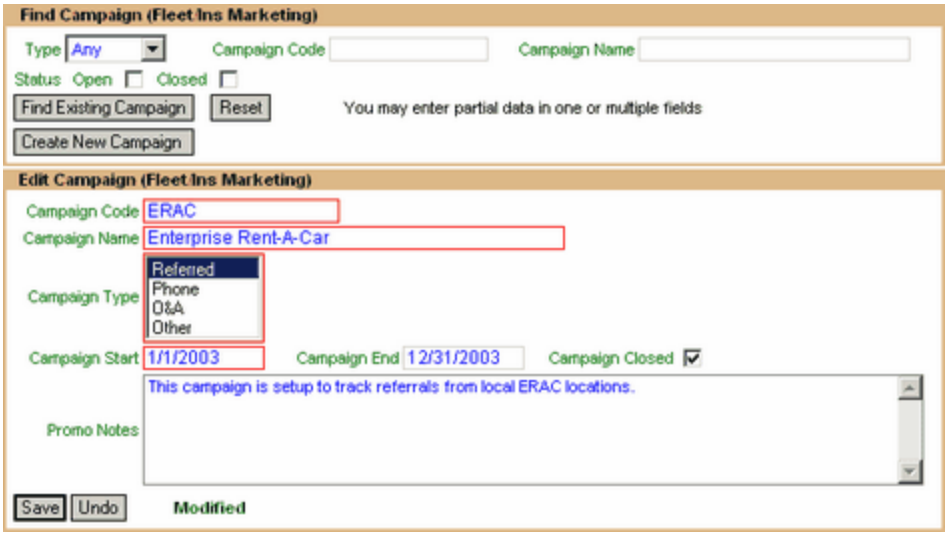

Edit Campaign (Fleet/Ins Marketing) Window - Closed Campaign

You may also close a campaign by highlighting the campaign line in the Find Campaign (Fleet/Ins Marketing) listing and clicking on the Close Campaign button in the Sub Menu.

NOTE: Once a Campaign is closed, it cannot be reopened.

7.4 Marketing Reports

If you want to see how a campaign is performing, click on the Marketing Reports button and the Reports Sub Menu will be displayed.

Marketing Reports Sub Menu

Choose a report type from the Sub Menu.

Campaign Reports

When you click on the Campaign Reports button, the Owner Report window will appear in the Work Area.

Owner Report Window

1. Select a Report: Owner By Type ◉ or Campaign By $ ◯.
2. Select a date range.
3. Select a Status. You can choose both open and closed if necessary.
4. Choose a Campaign. You can only choose one Campaign at a time.
5. Review the information selected to make sure it is what you want for your report. Click on the

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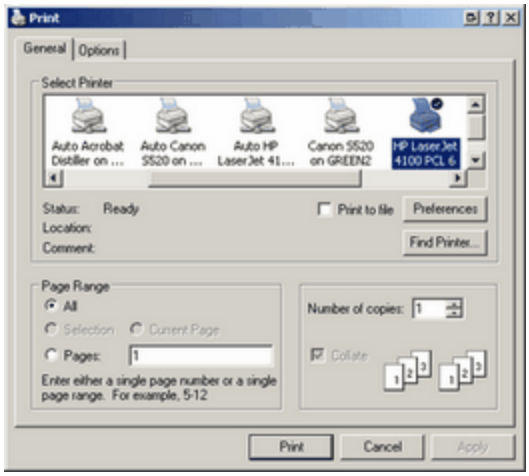
Show Report button to build the report.

6. You can also print the report by clicking on the Print Report button which will open the report in another browser window. Click on the Print Report button in this browser window. The print dialogue box will appear. Click on the Print button to send the report to the printer you have selected. When you have finished, click on the Close Window button.



Print Dialogue Box

Agent Reports

When you click on the Agent Reports *button, the Agent Report window will appear in the Work Area. This report is based on information entered in C & V Relationship Management - Agent Contact and as applied on the Agent Tab of each record.*

Agent Report Window

1. Select a Report: Agent Company *or* Agent Contact .
2. Select the report type: Agent by Claims *or* Agent by $.
3. Select a Date Range.
4. Review the information selected to make sure it is what you want for your report. Click on the Show Report button to build the report.
5. You can also print the report by clicking on the Print Report button which will open the report in another browser window. Click on the Print Report button in this browser window. The print dialogue box will appear. Click on the Print button to send the report to the printer you have selected. When you have finished, click on the Close Window button.

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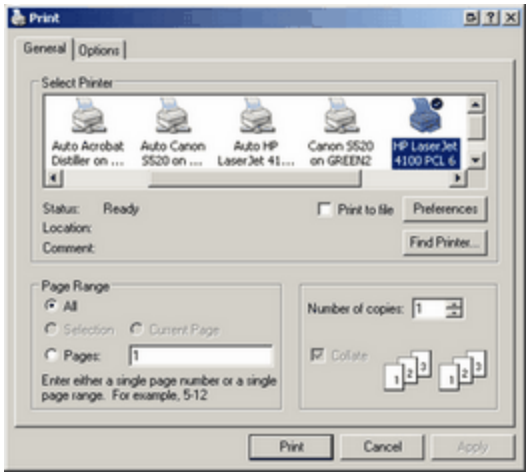


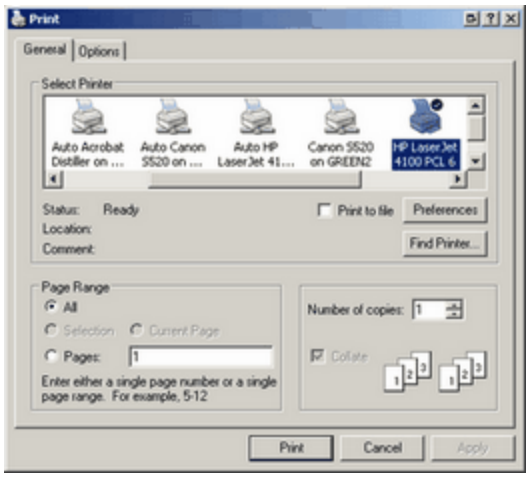
Print Dialogue Box

Fleet/Insurance Reports

When you click on the Insurance Reports button, the Insurance Report window will appear in the Work Area.

Insurance Report Window

1. Select a Report: Insurance by Claims ◉ or Insurance by $ ○.
2. Select a Date Range.
3. Review the information selected to make sure it is what you want for your report. Click on the Show Report button to build the report.
4. You can also print the report by clicking on the Print Report button which will open the report in another browser window. Click on the Print Report button in this browser window. The print dialogue box will appear. Click on the Print button to send the report to the printer you have selected. When you have finished, click on the Close Window button.



Print Dialogue Box

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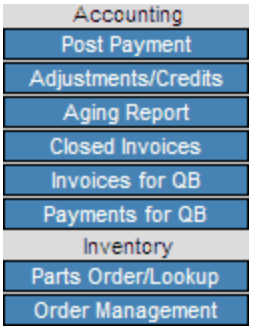
Part 8

8 Accounting

eDirectGlass has a complete Accounts Receivable module that allows you to manage the billing process. When you click on the Accounting button on the Menu Bar, the Accounting Sub Menu is displayed.



Accounting Sub Menu

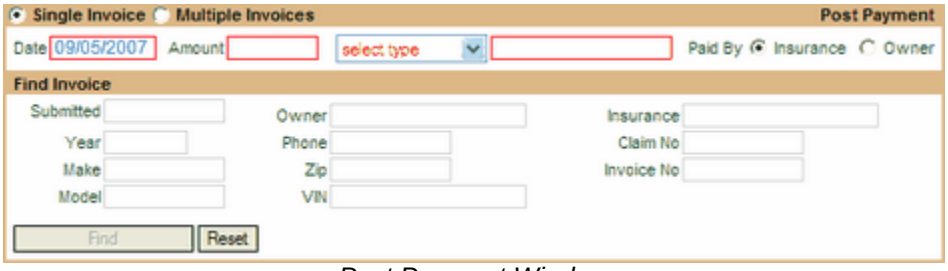
8.1 Accounting Overview

When you submit Invoices in eDirectGlass, you can manage the receivables process using the Accounting module. In this module, you can post payments, adjust invoices and manage collections using accounting reports.

eDirectGlass does not contain any other accounting module such as Accounts Payable, Payroll, etc. We recommend many different accounting packages for complete accounting such as QuickBooks, Peachtree or MYOB.

8.2 Post Payment

To post a payment to an Invoice, click on the Post Payment button and the Post Payment window is displayed in the Work Area.



Post Payment Window

1. Select whether you are going to post a payment for a Single Invoice or for Multiple Invoices. There are times when a Insurance company may send you a combined payment for multiple invoices; therefore, you would select Multiple Invoices.
2. Enter the Total Amount to post against the Invoice(s).
3. Select the Payment Type from the drop-down list and then enter the referral number of the payment (check number or credit card approval code).
4. **Select whether the payment is from Insurance or the Owner.**
5. In the Find Invoice window, enter the Invoice Number or one of the other fields and click on the Find button. You can also just click on the Find button with no search criteria to list all of your outstanding Invoices.
6. The Invoice Lookup screen will display in the Work Area.

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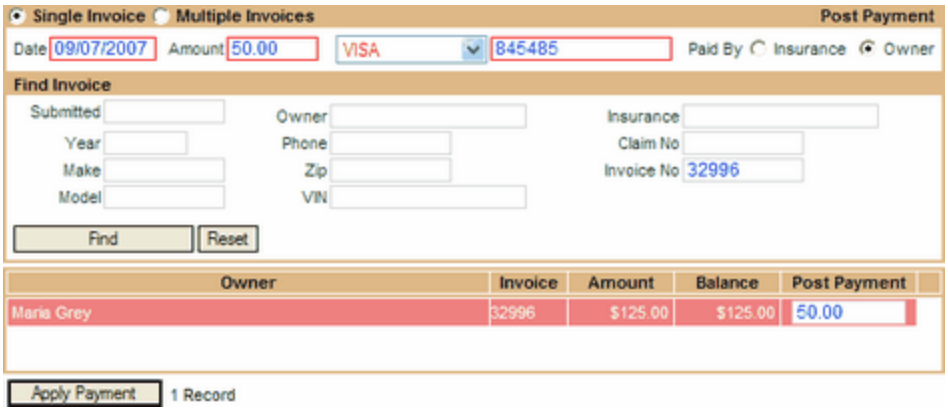
7. Select the Invoice and the Payment Amount will be added to the Post Payment Field.
8. Click on the Apply Payment button to post the payment.



Apply Payment Window

9. After the payment has been posted, the Apply Payment window will update and reflect the new balance.

Updated Apply Payment Window

If you choose the Multiple Invoice button at the top of the screen, you will need to choose the Paid By from Insurance or Owner. The Payor list will be based on this selection (e.g, Paid By Insurance will give you a listing all of the Insurance Companies that have outstanding invoices).

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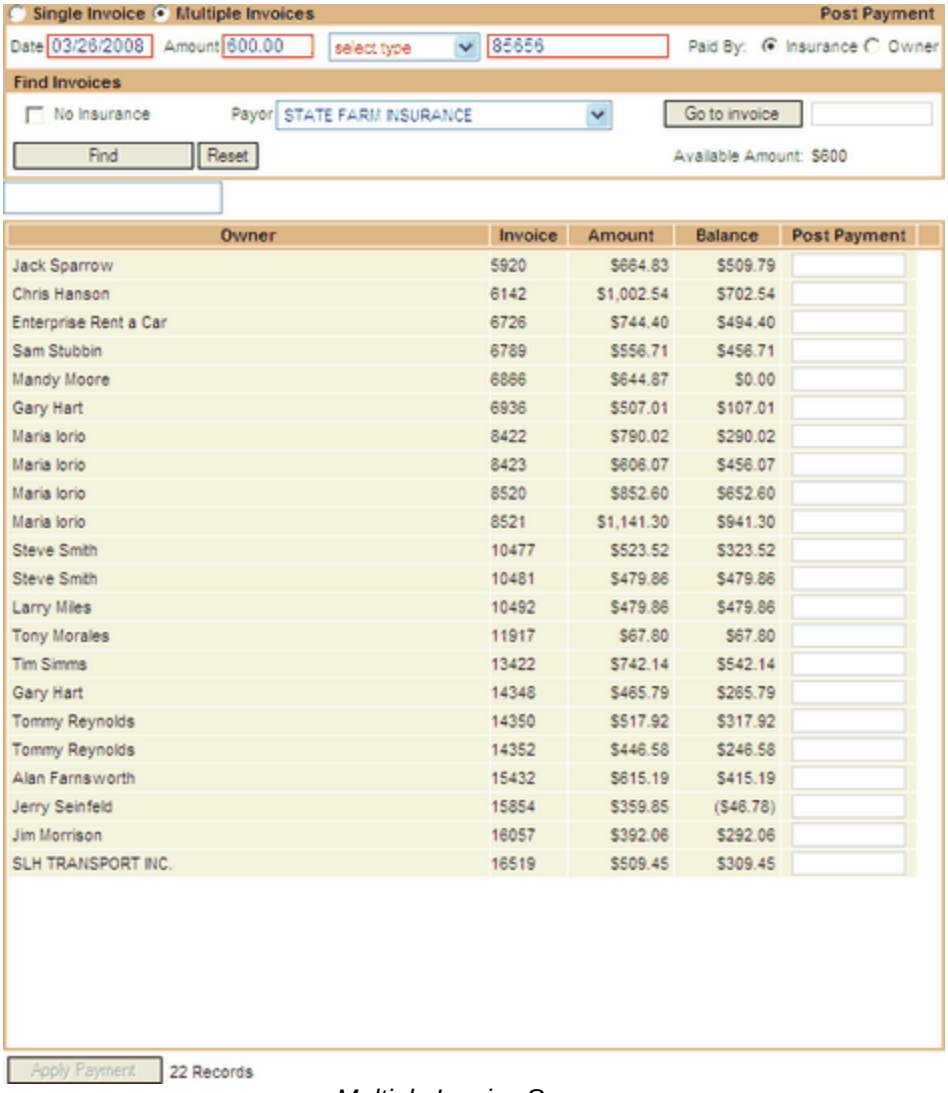
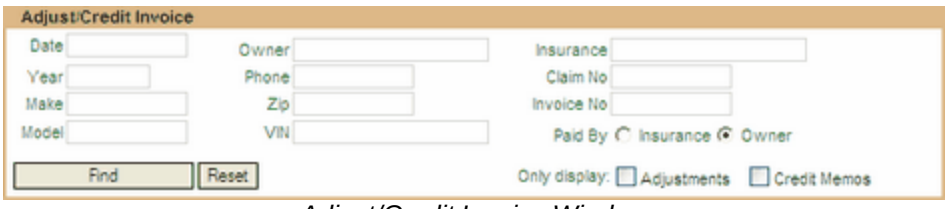


Multiple Invoice Screen

8.3 Adjustments/Credits

Situations will arise from time to time that will require you to adjust an Invoice. For example, you may need to waive a deductible or agree to discount an Invoice to meet program requirements after an Invoice has been submitted. It is important to track these adjustments for accounting and management reasons.

To adjust an Invoice, click on the Adjustments/Credits button and the Adjust/Credit Invoice window will display in the Work Area.



Adjust/Credit Invoice Window

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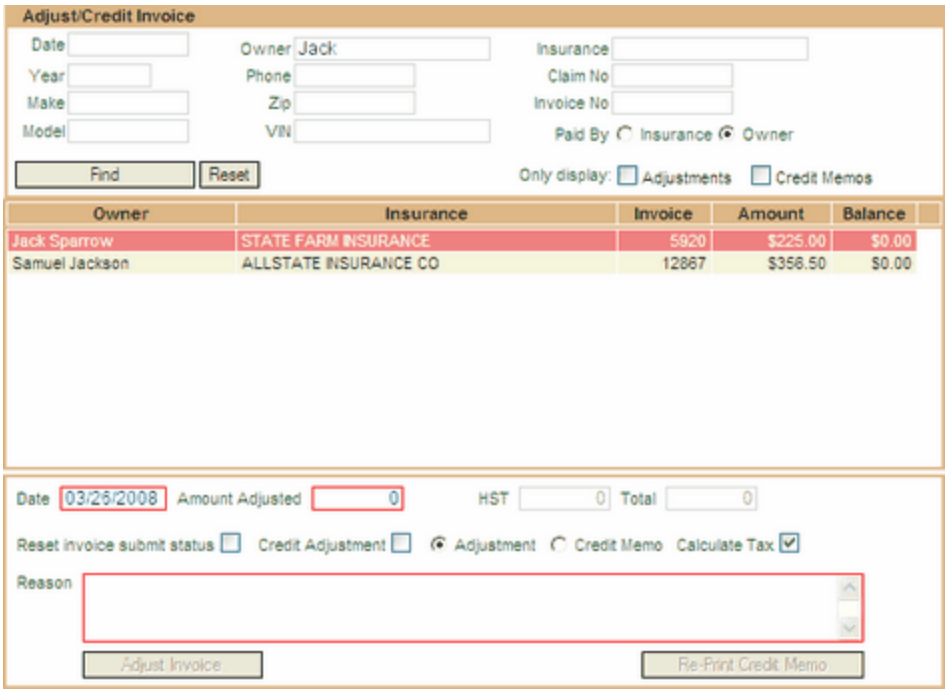
1. Enter an Owner, Insurance Company or Invoice Number and click on the Find button.
2. In the Find list, click on the Invoice you want to Adjust.
3. The Adjustment window will display in the Work Area.
4. Enter the Amount to Adjust and a Reason for the adjustment and click on the Adjust Invoice button. **NOTE: eDirectGlass will automatically apply taxes to the Adjustment amount unless you UNCHECK the** Calculate Tax **box. The** Credit Adjustment **box is used to note a payment that has already been applied in the eDirectGlass system, but for another invoice (a fully credited invoice).**



Adjustment Window

5. The Adjust Invoice window will refresh and display the Invoice with the adjustment applied.

8.3.1 Credit Memo

To create a Credit Memo, click on the Adjustments/Credits button and the Adjust/Credit Invoice window will display in the Work Area.

Adjust/Credit Invoice Window

1. Enter an Owner, Insurance Company or Invoice Number and click on the Find button.
2. In the Find list, click on the Invoice for which you want to create a Credit Memo.
3. The Adjust/Credit window will display in the Work Area.

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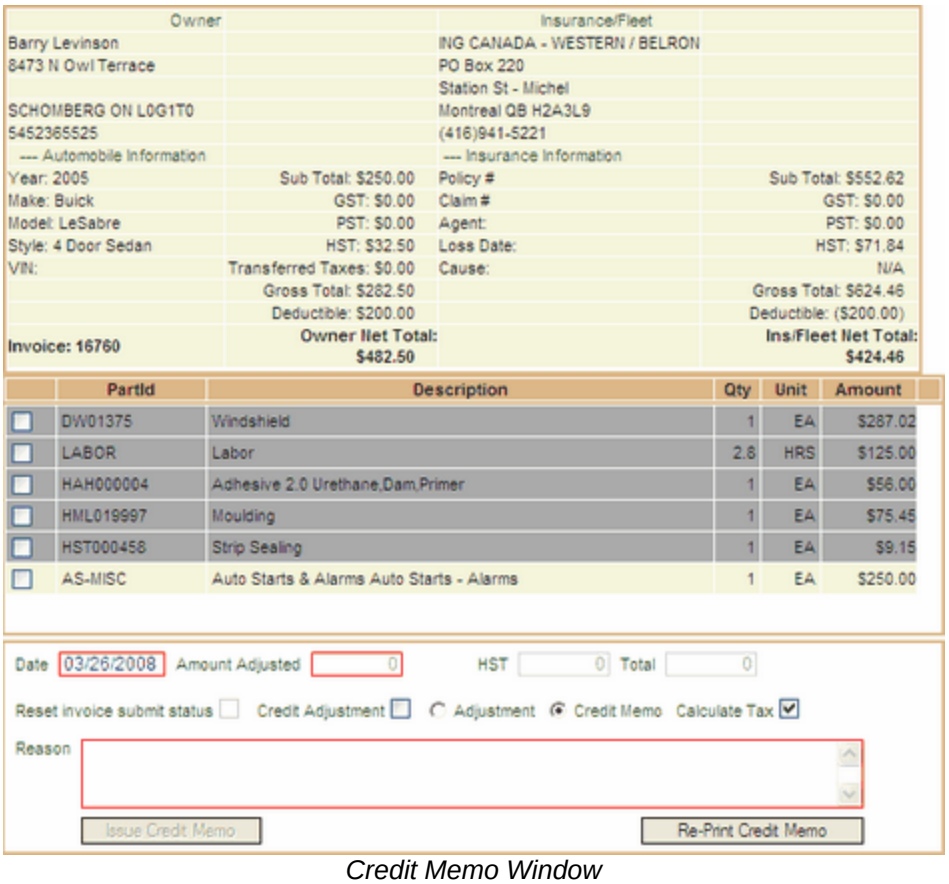
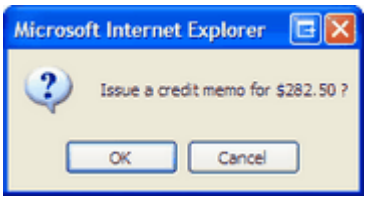
4. Select the Credit Memo radio button. This will display the invoice parts detail in the Work Area.



Credit Memo Window

5. Check off the part(s) you wish to credit and enter in a reason, then click on the Issue Credit Memo. A pop-up will display. Click on the OK button. This will bring up the Credit Memo report for you to be able to print a copy.



Credit Memo Dialogue Box

8.3.2 Reset Invoice Status

There may be times after you have submitted an invoice to an Insurance Company where you may need to make changes that do not effect the pricing that was submitted to the Insurance Company (i.e., you need to update a VIN Number or change an address). In order to make any changes to an already submitted invoice, you must first change the submission status and then you can make changes to the invoice.

To reset the submission status on an invoice, click on the Adjust Invoice button and the Adjust Invoice window will display in the Work Area.

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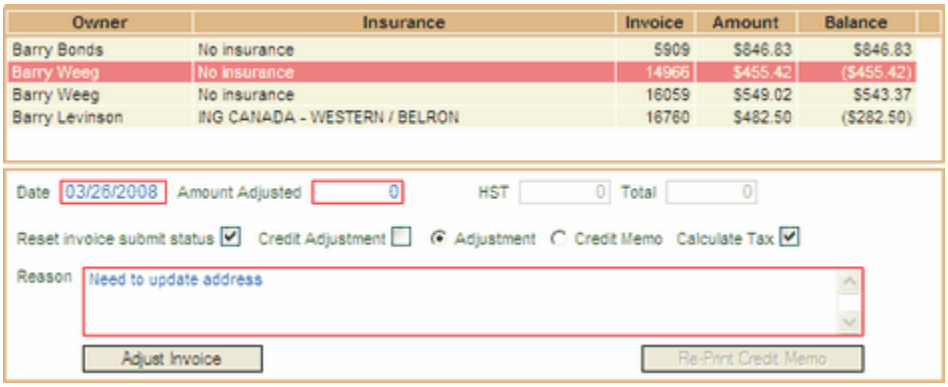
Adjust/Credit Invoice Window

1. Enter an Owner, Insurance Company or Invoice Number and click on the Find button.
2. In the Find list, click on the Invoice you want to Adjust.
3. The Adjustment window will display in the Work Area.
4. Enter a 0 (zero) in the Amount to Adjust box, click on the Reset invoice submit status ☑, enter a Reason for the status change in the Reason box and click on the Adjust Invoice button.



Adjustment Window

5. You will now be able to make and save changes to the invoice.

8.4 Aging Report

To create and review an Aging Report, click on the Aging Report button in the Accounting Sub Menu and the Aging Report window displays in the Work Area.

Aging Report Window

1. Enter the Aging search criteria and click on the Find button.
2. The Aging Report will display in the Work Area.

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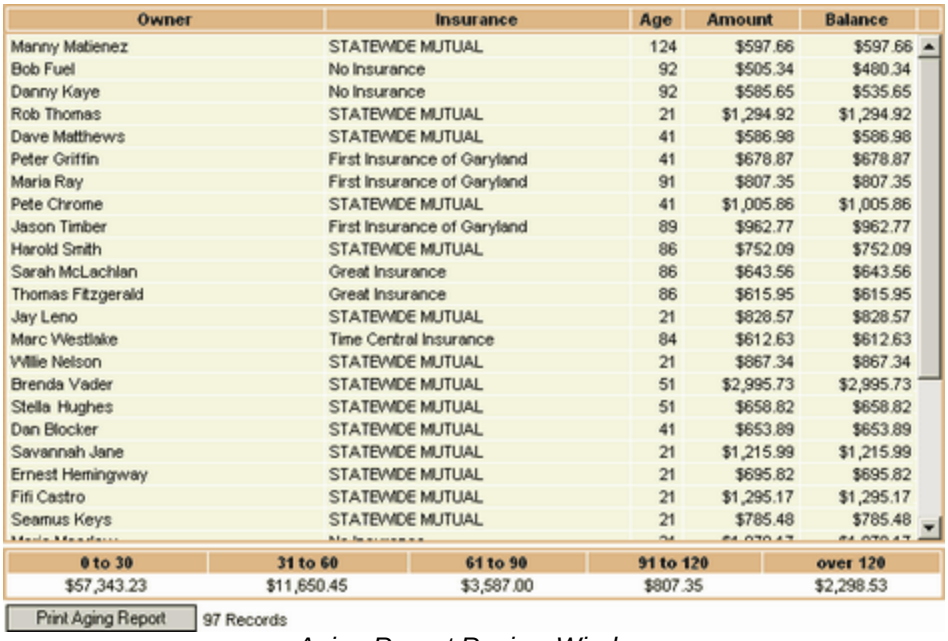


Owner	Insurance	Age	Amount	Balance
Manny Matienez	STATEWIDE MUTUAL	124	$597.66	$597.66
Bob Fuel	No Insurance	92	$505.34	$480.34
Danny Kaye	No Insurance	92	$585.65	$535.65
Rob Thomas	STATEWIDE MUTUAL	21	$1,294.92	$1,294.92
Dave Matthews	STATEWIDE MUTUAL	41	$586.98	$586.98
Peter Griffin	First Insurance of Garyland	41	$678.87	$678.87
Maria Ray	First Insurance of Garyland	91	$807.35	$807.35
Pete Chrome	STATEWIDE MUTUAL	41	$1,005.86	$1,005.86
Jason Timber	First Insurance of Garyland	89	$962.77	$962.77
Harold Smith	STATEWIDE MUTUAL	86	$752.09	$752.09
Sarah McLachlan	Great Insurance	86	$643.56	$643.56
Thomas Fitzgerald	Great Insurance	86	$615.95	$615.95
Jay Leno	STATEWIDE MUTUAL	21	$828.57	$828.57
Marc Westlake	Time Central Insurance	84	$612.63	$612.63
Willie Nelson	STATEWIDE MUTUAL	21	$867.34	$867.34
Brenda Vader	STATEWIDE MUTUAL	51	$2,995.73	$2,995.73
Stella Hughes	STATEWIDE MUTUAL	51	$658.82	$658.82
Dan Blocker	STATEWIDE MUTUAL	41	$653.89	$653.89
Savannah Jane	STATEWIDE MUTUAL	21	$1,215.99	$1,215.99
Ernest Hemingway	STATEWIDE MUTUAL	21	$695.82	$695.82
Fifi Castro	STATEWIDE MUTUAL	21	$1,295.17	$1,295.17
Seamus Keys	STATEWIDE MUTUAL	21	$785.48	$785.48

0 to 30	31 to 60	61 to 90	91 to 120	over 120
$57,343.23	$11,650.45	$3,587.00	$807.35	$2,298.53

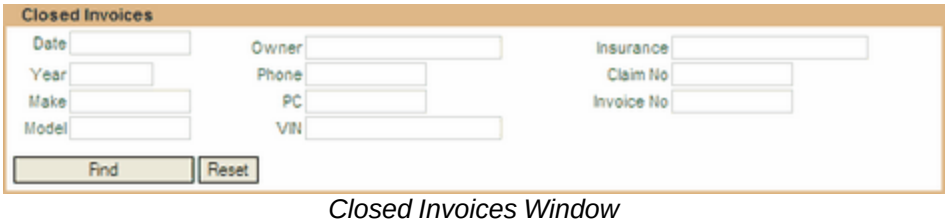
Print Aging Report 97 Records

Aging Report Review Window

3. To print the Aging Report, click on the Print Aging Report button.

8.5 Closed Invoices

The Closed Invoices section lets you see a list of all invoices that have a balance of $0.



Closed Invoices Window

1. Enter the criteria for the closed invoices you want to view and click on the Find button or you may click on the Find to view a list of all closed invoices.
2. You can select an invoice and click on the Display Statement button to view the item detail.

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Closed Invoices
Date
Year
Make
Model
Owner
Phone
PC
VIN
Insurance
Claim No
Invoice No
Find
Reset
Owner | Insurance | Invoice | Amount | Balance
Tony Bones | ALLSTATE INS.- VEHCILE INSPECT | 0 | $0.00 | $0.00
John Williams | No insurance | 0 | $0.00 | $0.00
Gary Hart Enterprise Rent a Car | No insurance | 0 | $0.00 | $0.00
Gary Hart Enterprise Rent a Car | ICBC OUT OF PROV./BELRON | 0 | $552.67 | $0.00
Henry Hill | No insurance | 0 | $0.00 | $0.00
Fred Flintstone | No insurance | 0 | $0.00 | $0.00
ENTERPRISE RENT A CAR | ENTERPRISE RENT-A-CAR | 0 | $546.93 | $0.00
Gary Hart Teds Fast Way | No insurance | 0 | $0.00 | $0.00
Gary Hart Teds Fast Way | No insurance | 0 | $0.00 | $0.00
Gary Hart | No insurance | 0 | $0.00 | $0.00
Mandy Moore | AVIVA INS CO OF CDA / BELRON | 0 | $0.00 | $0.00
Mandy Moore | AVIVA INS CO OF CDA / BELRON | 0 | $0.00 | $0.00
CASH Customer | No insurance | 0 | $0.00 | $0.00
Boyds Auto Body | Boyds Auto Body | 0 | $0.00 | $0.00
Gary Hart | STATE FARM INSURANCE | 0 | $0.00 | $0.00
Gary Hart | ICBC OUT OF PROV./BELRON | 0 | $0.00 | $0.00
Maria Iorio | No insurance | 0 | $0.00 | $0.00
Maria Iorio | No insurance | 0 | $0.00 | $0.00
Maria Iorio | No insurance | 0 | $0.00 | $0.00
Larry Metalhead | No insurance | 0 | $0.00 | $0.00
Farmer Ted | No insurance | 0 | $0.00 | $0.00
Larry Metalhead | No insurance | 0 | $0.00 | $0.00
Gary Hart Teds Fast Way | No insurance | 0 | $0.00 | $0.00
Larry Metcalf | No insurance | 0 | $0.00 | $0.00
Larry Metalhead | No insurance | 0 | $0.00 | $0.00
Felix Standpoint | No insurance | 0 | $0.00 | $0.00
Felix Standpoint | No insurance | 0 | $0.00 | $0.00
Larry Metalhead | No insurance | 0 | $0.00 | $0.00
test test | No insurance | 0 | $0.00 | $0.00
Gary Hart | ICBC OUT OF PROV./BELRON | 0 | $0.00 | $0.00
Maria Iorio | No insurance | 0 | $0.00 | $0.00
Herb Fowlie | No insurance | 0 | $0.00 | $0.00
Darren Cox | No insurance | 0 | $0.00 | $0.00
Gary Hart | No insurance | 0 | $0.00 | $0.00
Gary Hart | No insurance | 0 | $0.00 | $0.00
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Sales Report Review

8.6 Invoices for QB

If you have completed your QuickBooks setup, you may begin exporting submitted invoices to QuickBooks.

1. Click on the Invoices for QB button to display the QuickBooks Invoices screen in the Work Area.

2. Click on the Find button to display a list of invoices that may be exported to QuickBooks. **NOTE: You MUST have the correct QuickBooks file open before you export invoices from eDirectGlass**.

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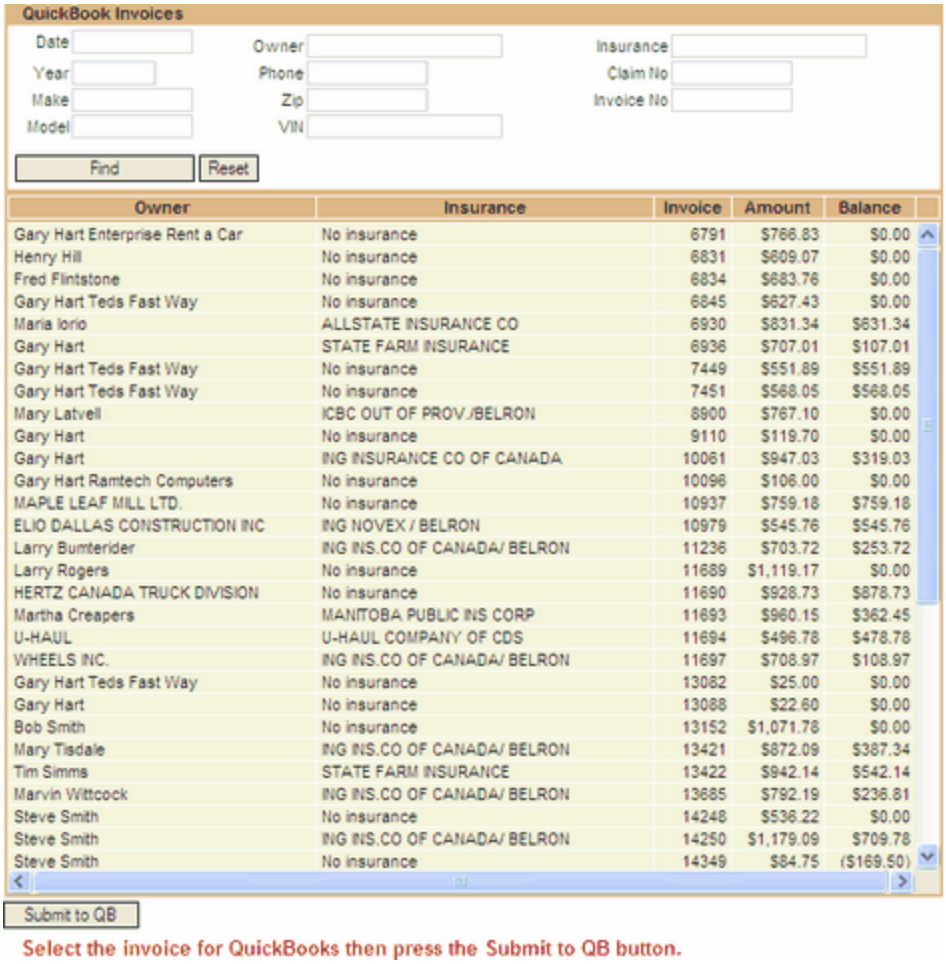
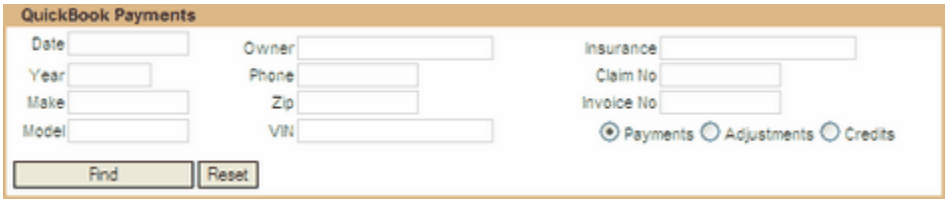


3. Select the invoice you wish to export (one at a time) then click on the Submit to QB button to send the invoice to QuickBooks.

8.7 Payments for QB

You may send export Payments, Adjustments and/or Credit Memos entered into eDirectGlass down to QuickBooks.

1. Click on the Payments for QB button to display the QuickBooks Payments screen in the Work Area.



2. Click on the Find button to display a list of Payments (Adjustments or Credits) to be exported to QuickBooks.

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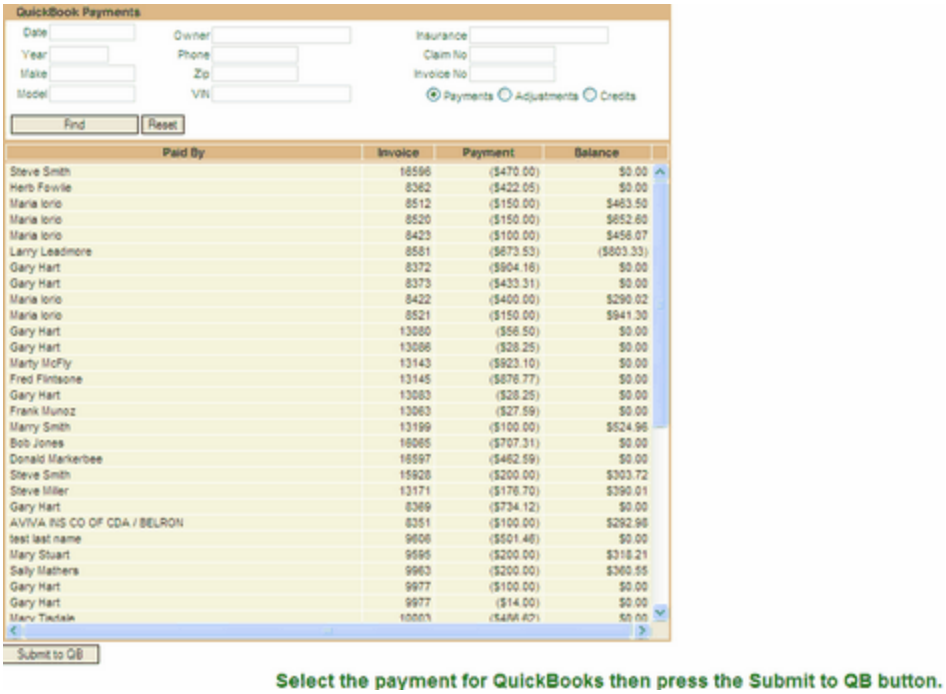

3. Select the Payment (Adjustment or Credit) you wish to export to QuickBooks then click on the Submit to QB button to send it down to your opened QuickBooks file.

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Part 9

9 Help & Reporting Issues

On-Line Help Manual

On any screen you can find the

button located below the Sub Menu on the left hand side of the screen. Clicking on this button will take you to our on-line help manual to the section relating to the module you are in when you requested help.

Live Help

If you require further assistance, you can click on the

button also located below the Sub Menu to discuss your issue with a technical support representative during normal business hours.

You may also send an e-mail to technical support via the

button after normal business hours.

Reporting Bugs

You can also report any issues with the program by clicking on the

button located underneath your user name in the upper right hand corner of the screen. Clicking on this button will bring up the Report Issue window which will require you to enter information concerning your problem and the computer you were using when you experienced the issue.

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Total Shop Management
User Manual

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